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ABSTRACT

The International Working Group on Education (IWGE) met in Lisbon, Portugal, in November 2001. Participants came from 26 institutions representing 10 international agencies or institutions, 4 foundations, and 12 bilateral agencies. This publication is a summary of the proceedings of that meeting. It begins with opening and welcoming keynote addresses. Each subsequent chapter is devoted to a summary of a major theme of the meeting. Theme 1 gave representatives of the various institutions the opportunity to brief the meeting on any significant changes, actual or prospective, in policy, organization, and working procedures since the previous meeting. Theme 2 focused on measures to ensure that groups often denied or excluded from educational opportunities gain access to them. The discussion also examined ways of alleviating the cost of education for the poor. Theme 3 surveyed experiences and issues in effect to establish sector-wide approaches to developing policies and programs in education as well as progress in enabling countries to reduce their debt burden and devote more resources to education and health. Theme 4 focused on the effects, implications, and prognosis of the HIV/AIDS emergency and the challenges it poses for education policy and action. (WFA)

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A report from the IWGE

ED 480 155

'Including the excluded' and international development co-operation

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Meeting of the International Working Group on Education (IWGE)
Lisbon, 19-21 June 2001

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International Institute for Educational Planning

'Including the excluded' and international development co-operation

A report from the IWGE

Meeting of the
International Working Group on Education (IWGE)
Lisbon, Portugal, 19-21 November, 2001

Paris 2002
UNESCO: International Institute for Educational Planning

This document is the summary of discussions of the 2001 International Working Group on Education (IWGE) meeting. The views and opinions expressed in this volume are those of individual participants in the meeting and should in no way be attributed to UNESCO, the IIEP or to any of the agencies which are members of the Working Group.

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Preface

Continuity within evolution may be a hackneyed observation, but it does characterize the discussions of the *International Working Group on Education* (IWGE). Indeed, it may characterize the themes more than it does the participants. Fully 60 per cent of those who took part in the Lisbon meeting in November 2001 had not taken part in the Florence meeting of 2000, and 80 per cent had not been at Munich in 1998. Despite the 'throughput' of the individual participants, however, the constancy of their sponsoring institutions, the persistence of the core themes and the consistency of the values underlying their treatment are clear evidence that there is a community of broadly like-minded stakeholders committed to making better education available for all. The *constancy of the sponsoring institutions* also affirms their confidence that informal but wide-ranging exchanges and reflections, where personal opinions need not be trammelled by institutional cautions, do serve to enrich and strengthen the institutions themselves.

Over the past twenty years, and more, the central preoccupation of the Working Group has been *how to improve the effectiveness of development co-operation*. The current embodiment of this concern is the SWAp or *Sector-Wide Approach* to policy. As education is one of the fields in which thinking and practice in SWAp are being developed most actively, it is natural that SWAp should have featured prominently in the past three meetings of the IWGE, being on each occasion elaborated, refined and modified in the light of accumulating experience. The gradualness of its evolution was well expressed by the exasperation of one of the participants, who felt that the education community should really have learned more from the five years or so of experience with the approach. On the other hand, as a SWAp demands much stronger co-ordination between the international partners in both policies and procedures, along with more thoroughgoing reliance on the capacities and

effectiveness of partner governments, gradualness may well be the most prudent course.

Education For All (EFA) has been the major substantive theme of discussion for the Working Group, since the beginning, with special emphasis on *quality* and *equity* questions. The following two specific issues which figured on the Agenda of the Lisbon meeting might be well worth highlighting.

The first one relates to providing education to persons with disabilities. The papers presented brought into the open how the discussions on EFA have tended simply to overlook the disabled, even though they are more disadvantaged than most. Dealing with the issues involved will be tough for the countries that cannot yet guarantee *Universal Primary Education* (UPE), since even the OECD countries find themselves ducking some of the implications of providing full educational opportunities for people with disabilities. But the issues will not 'just go away' and forums like the IWGE serve to help keep them in front of educational policy-makers and to spread knowledge of how they might be tackled productively.

The second issue has to do with the uses of *Information Technology* (IT). This is of course currently a topic in high fashion, and the IWGE meeting certainly helped to keep its participants abreast of emerging potentials for promoting learning, as well as assuring more *Education For All* (EFA). One case demonstrates that there is actually a way to excite totally unschooled and very likely illiterate street children into learning how to 'surf the web', and doubtless pick up language and other skills as they do it. *"How and along what dimensions might such spontaneous learning compare with scholastic systems?"* Less dramatically but with no less promise, IT has made it possible to enable schooled but less than adequately qualified young people to accumulate helpful qualifications in 'bite-sized' chunks, at their own pace, over generous periods of time at relatively low cost. Perhaps with some surprise, we find that many mature learners appreciate the new opportunities

of learning at a distance or on line, but actually would prefer, if at all possible, to have the opportunities embodied in an old-fashioned classroom and book.

A well-known problem plagues meetings like the IWGE, where influential policy-makers and advisers 'pause' a little to *listen*, *reflect* and *take stock*. How best, within the always-restricted time, can the need for discussions that are deeply probing, rather than cursory, be reconciled with the number of issues that clamour for attention and priority? In common with many others, this meeting did not fully solve the problem, either through the allocations of time for particular topics, or through devices like groups tasked with dealing with one issue in depth. Nevertheless, I feel confident in asserting that none of our participants left the meeting with any sense of time wasted or dissatisfaction. The variety and relevance of information, arguments and views were rich enough to have repaid any opportunity costs.

John Oxenham on behalf of the Secretariat drafted this Report, then circulated it for comment to the Members of the Planning Committee, before publication. As with its predecessors, it reflects only the personal perceptions and views of the participants themselves, not the views or policies of the institutions for which they work, nor the views or policies of either the IIEP or UNESCO.

Gudmund Hernes
Director, IIEP

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Composition of the IWGE Planning Committee

The *International Working Group on Education* (IWGE) is an informal group of aid agencies and foundations, which come together at regular intervals to discuss issues of common interest relating to international co-operation in the field of education. At present, the *IWGE Planning Committee* is composed of representatives of the following agencies:

- Aga Khan Foundation (AKF)
- Department for International Development (DfID), United Kingdom
- International Bank for Reconstruction and Development (IBRD or World Bank)
- Swedish International Development Agency (Sida)
- United Nations Children's Fund (UNICEF)
- United Nations Educational, Scientific and Cultural Organization (UNESCO)
- United States Agency for International Development (USAID)

The Secretariat of the *International Working Group on Education* is provided by the *International Institute for Educational Planning* (IIEP).

List of abbreviations

ACP	African, Caribbean and Pacific (countries with special agreements with the European Union)
ADEA	Association for the Development of Education in Africa
AfDB	African Development Bank
AfD	Agence française de Développement (France)
AKF	Aga Khan Foundation
BMZ	Bundesministerium für Zusammenarbeit (German Federal Ministry for International Co-operation)
BRAC	Bangladesh Rural Advancement Committee
CARICOM	Caribbean Community
CBOs	Community Based Organisations
CIDA	Canadian International Development Agency
CII	Sector of Communication, Information and Informatics, UNESCO
CLT	Culture Sector, UNESCO
CtC	Child-to-Child
DAC	Development Assistance Committee of the OECD
DfID	Department for International Development (UK)
DGIS	Directorate General for International Co-operation
DSE	Deutsche Stiftung für internationale Entwicklung (German Foundation for International Development)
DSE	German Agency for Technical Co-operation
ECCD	Early Childhood Care and Development
ED	Education Sector, UNESCO
EFA	Education For All
ESAC	Education Sector Adjustment Credit
EU	European Union
FAO	Food and Agricultural Organization of the United Nations
FRESH	Focusing Resources on Effective School Health

G8	Group of Eight (largest industrialized economies: Canada, France, Germany, Italy, Japan, Russia, the United Kingdom, and the United States of America)
GTZ	Gesellschaft für Technische Zusammenarbeit (German Agency for Technical Co-operation)
HIPC	Highly Indebted Poor Countries initiative for debt reduction
HIV/AIDS	Human Immuno-Deficiency Virus/Acquired Immunity Deficiency Syndrome
IBE	International Bureau of Education
IBRD	International Bank for Reconstruction and Development (World Bank)
ICT	Information and Communication Technologies
IDA	International Development Association, concessionary loan window of the World Bank Group for countries with less than US$925 per capita annual income
IDB	Inter-American Development Bank
IE	Infants Education
IIEP	International Institute for Educational Planning (UNESCO)
ILO	International Labour Office
IMF	International Monetary Fund
IWGDD	International Working Group on Disabilities and Development
IWGE	International Working Group on Education
JICA	Japanese International Co-operation Agency
LDCs	Least Developed Countries
MINEDAF	Ministers of Education in Africa
NGOs	Non-Governmental Organizations
NIIT	National Institute for Information Technology
NORAD	Norwegian Agency for Development Co-operation
OECD	Organisation for Economic Co-operation and Development
OEI	Organización de Estados Iberoamericanos (Organisation of Ibero-American States)

ORT	Oral Rehydration Therapy
OU	Open University
PRSC	Poverty Reduction Strategy Credits
PRSP	Poverty Reduction Support Programme
PTAs	Parent/Teacher Associations
SHS	Sector of Social and Human Sciences, UNESCO
SMC	School Management Committees
Sida	Swedish International Development Agency
STDs	Sexually Transmitted Diseases
SWAp	Sector-Wide Approaches (to assistance for education and other sectors)
TA	Technical Assistance
UIS	UNESCO Institute for Statistics
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNICEF	United Nations Children's Fund
UPE	Universal Primary Education
USAID	United States Agency for International Development
WHO	World Health Organization

Introduction

The *International Working Group on Education* (IWGE) met in Lisbon, Portugal, from 19 to 21 November 2001, hosted by the Ministry of Education of the Government of Portugal. Participants came from a total of 26 institutions representing 10 international agencies or institutions, four foundations, and 12 bilateral agencies, most of which had been represented at the previous meeting in Florence. However, only 13 of the 34 participants had participated in that meeting.

The IWGE organizes informal discussions between the key representatives concerned with the development of education policies in the donor agencies. The group meets about every 18 months to two years for an intensive professional interchange on current policy issues, and the informality of the sessions ensures that wide-ranging discussion take place, in which the participants express their own personal views as well as those of their agencies. A list of those who participated in the 2001 meeting appears in *Appendix A*.

The IWGE has been meeting since the early 1980s, when it took over the functions of the earlier Bellagio Group, which also acted as a forum for high-level discussions of policies in aid to education. Its meetings are organized and supported professionally by the IIEP in Paris, which provides the Secretariat of the Working Group and is responsible, in collaboration with the *Group's Ad Hoc Planning Committee*, for the production of all the Reports. *Appendix B* provides a detailed programme of the discussions.

Following the opening addresses of Portugal's Minister of Education – delivered in his absence by the Secretary of State for Education – and of the Director of the IIEP, **Theme 1** gave the representatives of the various

institutions the opportunity to brief the meeting on any significant changes, actual or prospective, in policy, organization and working procedures since the previous meeting. The only exceptions were fuller presentations from the Host country and from newcomers to the Group: they included the Ministry of Education of Portugal, the *Organization of Ibero-American States* (OEI) and the *International Working Group on Disabilities and Development* (IWGDD).

Theme 2 focused on measures to ensure that groups often denied or excluded from opportunities for education gain access to them: rural dwellers, adolescents eligible for but unable to enter traditional secondary schools and people with disabilities and special needs. A special spotlight was switched on to teachers, who often find themselves neglected and excluded from contributing to decisions about their current and future roles, conditions and rewards in education systems. The discussions also looked at ways of alleviating the cost of education for the poor and the possibilities – and limitations – opened up by new and emerging information and communication technologies.

Theme 3 surveyed experiences and issues in efforts to establish sector-wide approaches to developing policies and programmes in education, as well as progress in enabling excessively indebted countries to reduce their debt burdens and devote more resources to their education and health systems.

Theme 4 focused on the *effects*, *implications* and *prognosis* of the HIV/AIDS emergency and the challenges it posed for development in general and, in particular, for education policy and action.

In its final substantive sessions, the IWGE was brought up to date on the progress made since the Dakar Forum to achieve the international targets for EFA by 2005 and 2015. It was then briefed on the work of the *Task Force on Education* set up at the G8 meeting in Genoa, Italy, in 2001.

In concluding its discussions, the IWGE as usual considered *topics*, *dates* and *venues* for its next meeting: the two latter points were provisionally set for late June, 2003, in Finland.

The discussions are summarized in the body of the main text. Except where the name of the presenter already appears on the Programme in *Appendix B*, statements are neither assigned to specific, named individuals, nor are the discussions necessarily presented in the order in which they took place. The Report attempts to draw out main issues and themes in an order that is logical rather than chronological, using the presentations and discussions to provide a source of information for the general reader as well as for those who attended the meeting and their agency colleagues.

The text of this Report is also available on the IIEP web site (www.unesco.org/iiep) with links to copies of the papers presented at the meeting.

Keynote and welcome addresses

Gudmund Hernes, Director, *International Institute for Educational Planning* (IIEP)
Opening Address

At this meeting, we shall focus first on how best to ensure that 'disadvantaged groups' are given the opportunity to have *the education they seek and to which they have a right*. Then we shall examine the interaction of agencies of development co-operation in supporting education through Sector-Wide Approaches (SWAp) and in enabling the productive use of reductions in national debt. After that, we shall proceed to look at the impact of HIV/AIDS on our societies and education systems and then at the progress made towards the international targets for *Education For All* (EFA). Before we enter into those discussions, however, I would like to compare where we stand *now* with where we *stood*, when we met in Florence last year, shortly after the Dakar Forum.

At that point, we confidently identified education as the nexus underlying development in all sectors and demonstrated that we had *viable plans*, the promise of *sufficient funds* and certainly *sufficient knowledge* to make *Education For All* a reality. But we *did identify a shortfall*, a 'critical deficit in capacity to use the knowledge, manage the money and implement the plans'. Our questions were concerned with how to train enough people to be trainers, analysts and designers, evaluators, managers and, *above all,* leaders in education. We also sought ways of ensuring accountability for attaining the EFA goals for 2005 and 2015. In short, we felt on the verge of a real breakthrough to *Education For All*.

Unfortunately, 17 months later, we seem to be entering a phase of pessimism and 'jolted' agendas. Two major events are responsible for driving this. *First*, there is the decline that is setting into the world's major economies and that will affect the world's economy as a whole. *Second*, there is the terrorist attack of September 11 upon the USA, which, among other repercussions, has helped accelerate economic deterioration. *Together*, they are *diverting attention from development* to *global risk and security*. They are draining funds away from development to the military, from long-range planning to emergency sheltering, feeding and rehabilitating refugees and reconstructing the damage of civil war and other conflicts. They are concentrating attention on measures to prevent further attacks and to what might be called 'siege budgets'.

Together, they have called into question the *adequacy* of the tools we have at our disposal to fashion policies and programmes that can cope with, and reverse, the negative outcomes and trends that these two events have engendered.

Reinforcing the recession and the events of September 11 is the persisting spread of HIV/AIDS. It now causes some 7-10,000 deaths every day. While we certainly need educational policies to combat and halt the spread, we also need to watch that the demands of these epidemic and other scourges like malaria do not exacerbate the drain away from education.

At this meeting then, after a loss of innocence, we face a set of new challenges as well. *First*, we must be determined to hold the course that the world has set, and *hold others to their solemn commitments to that course*. *Second*, we must not let up our efforts to mobilize the resources necessary to ensure that we do indeed *reach those goals of 2005 and 2015*. *Third*, we need to keep up – and also improve – careful monitoring of *progress* and *shortfalls*, as well as perfect methods of evaluation that will reveal more clearly and reliably the factors behind effectiveness and deficit. *Finally*, for all this, we need to rearticulate an organizing vision that will, on the one hand,

confirm the *credibility* of the goals and *sustain* our enthusiasm, commitment, energy, actual work in the field, and on the other, *cut the ground from under* the sceptics and cynics.

João Praia, Secretary of State for Education, Government of Portugal
Welcome address

On behalf of the Government of Portugal and particularly on behalf of my Minister of Education, I welcome this meeting of your Group here in Lisbon. My Minister deeply regrets that he cannot be with you today: as he is in Mozambique, attending the Fourth Meeting of Ministers of Education of Portuguese-speaking countries.

You have chosen a theme that is a central concern for us. 'Including the excluded' is a difficult and slow process. Nonetheless, we must not only persevere in the effort ourselves, we need also to act to catalyse and stimulate more action to keep the process moving. We recognize that we are becoming knowledge and information societies. All our people require permanent updating to guarantee that they remain qualified for the ceaselessly changing requirements of employment. They need to keep learning and all learning needs to be of knowledge that is in one sense or another functional.

Three domains emerge as crucial. The first is the *prevention of new exclusion*. The second is the *promotion of active, participative citizenship*. Third, is the promotion and facilitation of what we might term *reinsertion* into the world of work after periods of unemployment. Successful basic education is essential to avoiding exclusion in a heterogeneous society. Failure in school can only lead to one path and that is *social failure*, and from then on to *insecurity and dependence*. Which will, in turn, lead to *parallel economies and proliferating divisions in society*. Working to prevent exclusion in a heterogeneous society does not by any means entail the promotion of homogeneity. On the contrary, heterogeneity means that

education has to respect each student's individuality and be appropriate to the background of each person.

Exclusion is perhaps most acutely felt in countries that have developed their societies, economies and technologies at high speed. Old knowledge, old ways of working and organizing have been made outdated and obsolete at a pace too swift to allow for easy human adjustment. This negative side of globalization has generated losses of status and losses of confidence, not to mention the social problems that have arisen from the discovery by formerly competent workers that they have become functionally illiterate.

These observations point to the central importance of teachers. If teachers are to realise and accept that they, too, have a role in combating exclusion, using means and opportunities in the less strictly curricular activities of schooling, then we need strongly to emphasize their *training*, *re-training* and *support*.

It is now a truism that the world has indeed become a global village. There are interconnections between all of us. These should foster solidarity, and along with solidarity, an acceptance and respect for differences as well.

On behalf of the Minister and on my own behalf, too, I would like to wish you a fruitful three days of discussion and exchange.

Theme 1
Recent developments in the participating Agencies

'Show and Tell' session where Agencies present their most recent developments: Commentary

Although the threat of widening economic recession and the repercussions of the attacks on New York and Washington had appeared to presage reductions in government budgets, with corresponding or even disproportionate cuts in allocations for international development, the reports around the table showed that a number of donor governments had on the contrary reaffirmed the importance of sustaining international development and, in particular, the importance of sustaining the centrality of education. They understood that the still unacceptably large numbers of people in absolute poverty, the uneven distribution of the benefits of globalization, along with its negative impact on some of the more vulnerable people, the weaknesses of governance and the heightened risks to security together made development and its core component, education, more necessary, not less.

This constancy of view was notable, since what had been noted in the last IWGE meeting in Florence, was prevalent again, namely, that *"most agencies continued to face the pressures of organizational change and the very hard work involved in coming to terms with either reductions in staff numbers, re-organization of entire departments, changes in political direction ..."*. It seemed to suggest that, among donor governments, there was consensus across the political spectrum that promoting social and economic development in all countries was in everybody's best interest.

Also continuing and gathering strength was the trend to decentralize programme formation and decision-making away from head offices to field missions, with the aim of ensuring that support for policies and programmes was in close tune with the realities of co-operant countries. Similarly, the adoption and elaboration of *Sector-Wide Approaches* (SWAp) for delivering educational – and other – assistance had gathered more momentum (as is reported a little later, the meeting devoted a full session to discussing progress and problems with the approach), as had the move to provide support through policies and programmes, rather than through new or restored infrastructure. However, not all co-operant governments favoured the new approaches, preferring instead to continue with buildings and other infrastructure.

As at previous meetings, concerns with the education of girls and women, with early childhood care and education and with education to combat the epidemic of HIV/AIDS were prominent (a full session of the meeting considered this last topic).

Finally, the importance was reaffirmed of developing effective approaches to monitoring and measuring movement towards the EFA goals for 2005 and 2015.

African Development Bank (AfDB)

In line with the trend towards decentralization, the *African Development Bank* (AfDB) is in the process of re-opening its country offices. Five are already in operation. Also in line with the wider trend, since March 2000, the Bank has been implementing its new policy of moving from support for educational infrastructure to support for educational content and curriculum development, programmes and capacity building. However, this has not met with complete acceptance from its member governments, some of which would prefer to continue with the former policy. The Bank's move to lend to organisations in civil society, in addition to governments, has also met with some resistance.

It has issued two sets of guidelines, one on literacy and its impact on education enrolments, retention and quality, the other on reviews of quality in infrastructure and content.

For 2002, the Bank plans a major meeting on financing education in Africa, and will be promoting the development of leadership in education and more concern with the impact and sustainability of educational programmes. Overall, the AfDB wants to build a bigger presence in education in Africa.

Aga Khan Foundation (AKF)

The *Aga Khan Foundation* (AKF) continues to focus on countries in Central and South Asia and in East Africa and to co-operate with NGOs to promote basic education. Within the field of education, its main focus is *Early Childhood Care and Development* (ECCD), but the Foundation retains its concerns with children within families all the way through adolescence.

There has been increased interest in the Foundation's work in Central Asia, particularly from the Government of Tajikistan, which is pressuring the AKF both to expand its current work and to move into new areas. It is also being asked to take a leadership role in national and regional rollouts. The Government of Syria also has asked for an initiative in *Early Childhood Care and Development* (ECCD), as has the Government of Mozambique for its northern provinces. In the latter, an area development approach is being formulated.

Simultaneously, the AKF is preparing to start work in Afghanistan, when conditions permit, and is seeking partners. Any initiative in that country will *not be* at the expense of programmes or initiatives elsewhere.

Agence française de développement (AFD)

Since 1999 there have been important reforms and the AFD is now working on the French *Highly Indebted Poor*

Countries (HIPC) *initiative for debt reduction* process. A small team works on education and has an expanded mandate to widen its interests from infrastructure for basic education to capacity building, the decentralization of education systems, and working in close contact with civil society. Although basic education remains the priority, the Agency does support secondary and further education and is also involved in sector programmes at the national level in, for example, Burkina Faso, Mali and Senegal. Education is attracting increasing importance in AFD, especially for the countries that are educationally farthest behind.

Although Africa attracts a major portion of AFD's efforts, the Agency works also with the countries of the *African, Caribbean and Pacific* (ACP), as well as Cambodia, Laos and the Dominican Republic.

Austria

Economic conditions have compelled the Austrian Government to reduce the country's budget for international aid. However, as a large proportion of the budget is channelled through NGOs, activities may be maintained at close to their current levels. As regards education, a discussion is in train on how best to be of assistance, working through a SWAp. There is also a discussion between the NGO community and the scientific sector about the shape that development co-operation should take.

Belgium

In Belgium, the Ministry of Foreign Affairs has absorbed the agency for development co-operation, and country programmes are now the responsibility of their respective ambassadors. While the possibilities are recognized of conflicts between the interests of Belgium and those of its partner countries, the expectation is that they will be minimized by the fact that most of Belgium's aid budget is channelled through multilateral institutions, through universities partnered with institutions in recipient countries, and through NGOs. The bilateral budget is operated within 25 countries through the *Poverty Reduction Support Programme* (PRSP).

Aid policy ranks *education* as a priority along with *food and health*, as these are the sectors that will most closely serve in the *alleviation of poverty* and of course in attaining EFA. There is a new interest in pre-primary education, because the poorest families have largely not enjoyed any formal education, so that their children are at a considerable disadvantage on entering primary school. This of course threatens their ability and willingness to continue with and to complete the full course of schooling. The model here is UNICEF's work in education and health at the pre-primary level, as for example, in the Philippines.

The Agency expects that there will be further changes in development policy in the near future, but is not in a position to predict their nature.

Bundesministerium für Zusammenarbeit (German Federal Ministry for International Co-operation – BMZ) represented by the German Foundation for International Development (DSE) and the German Agency for Technical Co-operation (GTZ)

German international co-operation is undergoing a change of portfolios. Policy is moving towards closer definition and tighter focus. The 70 countries with which the BMZ co-operates have each been invited to select between one and three sectors on which to concentrate German aid. Only four of them have nominated education as a main priority, but others have said that they consider that education must contribute to the selected sectors.

Together with the tighter focus, policy is moving away from projects towards programme and sector support. Within education and in areas of conflict, the priority themes are *conflict resolution* and *education for peace*. These have been strengthened since September 11. In Germany itself, there is a campaign to attract greater public support for development activities through education programmes that highlight the themes of an interdependent world and the necessity of co-operation.

Canadian International Development Agency (CIDA)

Canada like most other countries is facing an economic squeeze, which is indeed creating the conditions for *a displacement of priorities*. Nevertheless, despite the attention to security and the military, both the Prime Minister and the Minister of Finance have *advocated* and *ensured* more resources for the international development budget, recognizing that the world's and Canada's security and prosperity depend on the advance of the *Least Developed Countries* (LDCs) and on the reduction of the disparities of well-being between them and the more industrialized countries.

CIDA itself is undergoing a process of renewal involving policies, directions and personnel. The process involves wide public discussion, both face-to-face and electronic.

CIDA currently has four priority areas: (i) Health and nutrition; (ii) HIV/AIDS; (iii) Child Protection and (iv) Basic Education. Thirty-eight per cent of CIDA's budget goes to these four priority areas. A policy statement on education aiming to quadruple the Agency's spending on education is on the Minister's desk. To strengthen its effectiveness, CIDA is revitalizing its Science and Technical cadres with five new hires.

At the moment and for the next six months, the education department is and will be working under the conditions of a pressure cooker. The reason is that Canada will be hosting the next G8 meeting and therefore the head of CIDA's education department will be taking over the Chair of the *Task Force on Education*, which is to report to the G8 Heads of Government by the end of April 2002. (A special briefing session on the *Task Force* took place at the end of the meeting and is reported separately below).

Department for International Development (DfID)

The Education Department of DfID has a new chief and will be moving to new offices close to Buckingham Palace at 1 Palace Street in London.

So far, the British economy has shown no signs of slowing down and the aftermath of September 11 in terms of security, the military and the economy has led to no reduction in the budget for international development. On the contrary, the Cabinet has decided that it needs to be increased to help prevent a slowdown in the economies of the developing countries.

DfID's attention is on further decentralizing its work to country offices and on supporting the *Jubilee 'Drop the Debt' Campaign* through the *Highly Indebted Poor Countries initiative for debt reduction* (HIPC). The move to SWAp has put education, as one of the first sectors to be operational, at the centre of attention.

The target-based Millennium Goals remain a focus. Indeed, the concerns with poverty reduction, mitigating the negative effects of globalization, governance and security increase the need to ensure that education remains central as a sector that underpins effectiveness and success in the others.

European Union (EU)

The EU is currently developing two communications on education. The first is *'Education for Poverty Reduction'*. It covers the move to SWAp, the need for frameworks to promote and support lifelong learning, and the need for social inclusion. The communication is due to appear during the spring of 2002. The second communication will deal with higher education and its revitalization.

The emphasis for 2002 identifies six priority areas for development co-operation and stresses the social sectors. The programming is in the final

stages for the ACP countries: of the 77 governments, 55 have already completed plans for the *Poverty Reduction Support Programme* (PRSP).

The European Parliament is also focusing on education for development.

Finland

The Government of Finland is reviewing its policies and programmes in international development in depth. It seeks to classify its partners into two groups. The first group includes 10 countries, with which long-term co-operation will be necessary. Each has selected three sectors for focus. Five of these countries have nominated education as one of their three priorities. The second group includes the countries of southern and eastern Europe and presents a new challenge to Finland's stock of development expertise.

The aid budget has been and will continue to be increased annually. However, the human resource base in Helsinki will *remain* constant, while the field offices in the Finnish Embassies in the co-operating countries will be *steadily strengthened.*

To date, no formal policy for work in the education sector has been published, although education is being examined as a cross-sectoral priority. However, there are three policy papers on (i) disability, (ii)HIV/AIDS and (iii) the role of *Information and Communication Technologies* (ICT) in development. As regards disability, policy on development co-operation has, since 1996, after a Nordic conference, included education for those with disabilities and special needs. Finland supports several programmes through NGOs, UNICEF and UNESCO and in general tries to observe the principle enunciated by the disabled: *"Say nothing about us without us."*

Food and Agricultural Organization of the United Nations (FAO)

In FAO, there is a new emphasis on EFA, '*Education for Food for All*', and the Organization is developing a systems approach to rural education,

as distinct from narrower concepts of agricultural or food education. With the IIEP, FAO is undertaking a capacity-building programme to tackle the problem that many member governments have *not yet grasped* and that is that FAO can help with education. Indeed, FAO has a fund intended for capacity building for education allocated to the rural poor, but the monies are not always spent, as partners do not come forward to 'co-operate' in their utilization.

Japan International Co-operation Agency (JICA)

There have been changes in the Ministry of Foreign Affairs and in the leadership of JICA and a new position paper on education has been published. It establishes four directions a: (i) geographical shift of concentration from East Asia to South Asia and sub-Saharan Africa, (ii) sectoral shift of focus from tertiary to basic education, (iii) search for ways to improve the effectiveness of aid to education and, (iv) further exploration of modalities for SWAp. In this last area, examples are possible balance-of-payments support for Ghana and a special *Funds Monitoring Unit.*

Within JICA there is simultaneously a crisis and hope for education. The Agency has to absorb a 10 per cent cut in its overall budget, but there is a possibility that the allocation for education will not be affected, *on the understanding that there will be determined efforts at raising the quality of education.* The Japanese public is critical of development spending, but values education.

JICA is dealing with three challenges. The first is that in SWAp, there is opposition to proposals for budgetary support, on the ground that it could fuel inflation in the recipient countries. The second is developing feasible modalities to implement SWAp: there is some nervousness about the complexities of delivery. The third is to satisfy JICA's critics by demonstrating the enhanced quality of educational aid.

Norwegian Agency for International Development (NORAD)

Norway's new Minister for International Development has declared, *"Education is priority Number 1!"* However, few people are as yet in place to see that this priority is actualized. NORAD has been reorganized to achieve better support for its country offices, and for its partner countries, and to foster cross-sectoral perspectives in thinking and planning. The current focus of thinking is on *"how to contribute to developing the private sector and promoting income-generation"*, using secondary vocational education as the main plank for forming the necessary *skills, attitudes and capabilities*.

Portugal

Portugal's aid programme responds to the Dakar *'Framework of Action'* for EFA. It covers basic education, improving secondary and technical and vocational education and training, and co-operation in higher education. Portugal's strategy rests on three pillars: (i) support for developing systems of education, with strategic plans, where they do not already exist; (ii) raising the quality of education through better teacher training and support; and (iii) institutional capacity building.

In Angola, Portugal supports work in training trainers in teaching Portuguese, Communication Skills and Integrated Science. In view of the conditions of civil conflict, there is an emphasis on education for special needs and disabilities, for example, instruction in sign language and in Braille. In Cap Verde, the focus is on teacher-training and new technologies. In Guinea-Bissau, it is on improving teacher quality through lending excellent teachers and developing better materials. In Mozambique, 68 primary schools damaged or destroyed by the floods of the past two years are being rebuilt and teachers and managers are being trained on a large scale. The prevention of HIV/AIDS receives special attention. There are also a large number and variety of projects in São Tome and Principe.

Swedish International Development Agency (Sida)

The Swedish Government has appointed a new Minister for official development assistance who comes from the EU Court of Audits. Although the focus is on longer-term development in the social sectors, the actual place of education remains imprecise for the moment. Although Africa remains still the most important portfolio, Sida's interests have expanded geographically to Laos in Asia and Honduras in Central America.

The new policy promotes SWAp, with a stronger focus on poverty reduction and with clear links to PRSP. For education, it advocates a more holistic approach to education as a system, although it does also take primary schooling to be a priority. However, the policy can and does support NGOs in education and already more than half Sida's budget for all sectors is channelled through them. Although there is a potential tension between SWAp and using NGOs, Sida has to recognise that there are actors in the education field, other than the government, for example, communities who want to build and run their own schools. How this tension will be managed is not fully clear yet, but Sida is learning from experience in other fields.

Because the policy insists that education in the *prevention* of HIV/AIDS and in the *care of infected people* must be mainstreamed, a special unit has been set up to see to its implementation.

There is also a concern for education in situations of emergency or post-conflict to encourage longer-term perspectives for reconstruction, rehabilitation and development. *A dedicated allocation of funds supports action on the matter.*

Sida is also promoting the integration of a rights-based approach in planning and delivering education, which is to say in the promotion of democracy. It includes the *'right to education'* and *'rights in education'*.

In addition, Sida is pursuing interests in adult basic education and literacy, for which it has commissioned a review of the state-of-the-art; education for people with disabilities and special needs; post-basic education; an action plan for education in democracy and human rights; environmental education; and in maintaining the flow of new documents and publications from the Education Division.

United Nations Educational, Scientific and Cultural Organization (UNESCO)

At the IBE International Conference on *'Learning to Live Together', 5-8* September 2001, there was surprising unanimity on the conditions and measures required to pursue *building peace* in the world. At the *UNESCO General Conference* after the events of September 11, around 200 ministers of education took part, which suggested that not everyone had been deterred from flying. The Conference agreed that there had to be a *'re-balance from too great a preoccupation with human capital for individual development to closer attention to social capital for forming better local, national and world societies'*. The agreement meant that there must also be closer attention to training and re-training teachers, as they constitute the main channel for reaching children and young people with ideas and information in this area.

The *UNESCO Institute of Statistics* (UIS) had now moved to Montreal and eight of its 30 employees have been transferred. New recruitment would give it new blood and strength. The UIS would be working more closely with the OECD on the *International Student Assessment Project*, and developing more feasible, precise and reliable methods for measuring progress towards the EFA goals in nonformal education and literacy, that are more difficult to measure. UNESCO would be reporting to the meeting more fully on EFA later.

IIEP had assumed full responsibility for the focus on HIV/AIDS within UNESCO: the meeting would have a full briefing on the matter later on.

United Nations Children's Fund (UNICEF)

UNICEF has published its *Medium-Term Strategic Plan*. This represents something of a paradigm shift for the Fund's work and lays down five major priorities: (i) Girls' Education, (ii) HIV/AIDS, (iii) Child Protection, (iv) Early Childhood Care and Development and, (v) immunization.

On *Girls' Education*, the stress would be on access, particularly in countries where the *Gross Enrolment Rate* was still less than 80 per cent and there were still too many girls out-of-school. There would also be efforts to raise the quality of education and through that the retention rates. There would be equal attention given to learning achievements and other educational outcomes, with the aim of attaining at least gender parity.

UNICEF is the lead Agency in the *UN Girls' Initiative*. Thirteen Agencies have so far formed a partnership to establish the *UN Girls' Education Institute* with the aim of promoting coherent policy and practice in the field. A technical meeting to advance the idea will take place in January 2002, in Paris and will be Hosted by UNESCO.

Early Childhood Care and Development (ECCD) will cover education across the board, with special attention to gender socialization.

United States Agency for International Development (USAID)

USAID is re-organizing itself in an effort to increase the integration of programmes. It recognizes that education is a crosscutting sector and plans to strengthen it. There had been hopes of a 27 per cent increase in funding. Instead, Congress is currently considering proposals to *raise the USAID budget by 128 per cent.*

International Bank for Reconstruction and Development (World Bank) IBRD

For education in the World Bank, these have been the 'best of times' and 'the worst of times'. There had been a sense of something amiss, for, despite intent, the year 2000 had seen fund allocation for education at a 10-year low and sector work in monitoring, research and analysis on education weak. Much soul searching occurred. However, the *perception of decline turned out to be illusory*, for the figures on lending alone did not reflect the full picture. Over the past few years, lending for Africa, the worst affected continent, had been running at between $150-200 million per year. It is now set to rise to *$250-300 million annually*. Even then, those figures are in the nature of the 'tip of the iceberg', for they do not take into account the additional resources that will be flowing into education from the *Highly Indebted Poor Countries (HIPC) initiative for debt reduction* and multi-sector *Poverty Reduction Support Programme* (PRSP) initiatives. Taken together, they indicate an annual increase that will take the figure up to some *$700 million* for education in Africa.

Furthermore, in 2001, the *International Agenda for Education* began to expand. The USA President Bush called for more *resources* for education, while the *Development Committee of the Governors* of the World Bank put education on its Agenda and requested a briefing by the *Bank's Education Department* on the progress made in *Education For All*. The briefing was actually under way on September 11, but it was interrupted by the attacks in New York and at the Pentagon. Those events actually gave a 'sharper focus' to education the following day, for education could be the ultimate answer to terrorism. President Bush wishes to see the IDA loans for education comprise a grant element of 50 per cent. On the other hand, other major shareholders of the World Bank argue for a grant element of only 17-20 per cent. What the Bank finally does depends on its shareholders reaching an agreement on this issue.

The World Bank is at something of a crossroads on how to harness this revived interest in education to best effect. It is shifting from concerns with procurement for projects to policy-based financing and a focus on issues and delivery systems, as well as from hiring architects to recruiting policy analysts, education economists and negotiators. It sees the current situation as an opportunity to bring more fundamental, longer-term issues into focus – inequality, for example. To capitalize on the opportunity, the World Bank is adopting a three-strand approach: ensuring that policy is translated into implementation and action on the ground; monitoring the millennium goals to see which countries move furthest and to link lending and support more directly to a country's progress; and country-by-country analysis of financing for EFA, so that gaps can be rapidly identified and measures developed and taken to close them.

Organization of Ibero-American States (OEI)

The OEI was established in 1949 by countries of Central and South America and the Iberian Peninsula, with its seat in Madrid and branches in several other countries. It was charged with promoting co-operation and interchange in education and also in science and culture. During the 1980s, member countries achieved *Universal Primary Education* (UPE), but rates of failure, repetition and drop out remained high, especially among the more socially deprived groups. During the 1990s there were more reforms and more joint efforts at raising quality and improving equity, including programmes in *Infants Education* (IF) or *Early Childhood Care and Development* (ECCD) aimed at parents. The focus was widened to include what was termed the productive insertion of less privileged groups into the mainstream economy, with a particular concern for first time job seekers.

In 1992, the OEI turned to adults in Paraguay, who had been totally deprived of schooling and offered a novel programme of bilingual literacy along with second-chance education and vocational training. The cost turned out to be only US$30 per participant.

The challenges for the OEI are going beyond *quantity* to raising *quality* and making these programmes sustainable. Also, can any lessons be drawn for the longer term? Making generalizations is difficult because of the varying and very specific conditions of localities in different countries.

Association for the Development of Education in Africa (ADEA)

There has been a change of leadership at ADEA. The two major concerns at the moment are, *first*, the political follow-up on innovations, networks of learning and new space for actors to promote further innovations; and, *second*, support for education to counter the HIV/AIDS pandemic.

On the innovations, ADEA faces the challenge of supporting countries in their efforts to move from pilot projects to national rollouts. After that comes the task of creating the networks necessary to publicize the lessons and enable other countries to learn from them. Simultaneously, ADEA needs to encourage the decentralization of responsibility for these projects, in order to create the space for fresh ideas to develop.

As regards HIV/AIDS education, ADEA needs to analyse successful anti-AIDS efforts. Even though the data on HIV/AIDS in education systems is very inadequate, action must nonetheless start. The topic needs to feature and be discussed across the entire school curriculum, even in mathematics, as well as in extra-curricular activities. ADEA has short-listed five countries for special efforts in AIDS education.

ADEA will be undertaking a process of reflection on its future role and how best it can step up its efforts to promote educational expansion and educational quality.

International Working Group on Disabilities and Development (IWGDD)

The IWGDD was founded in 1997 in an effort to have the education of children and adults with disabilities recognized as an integral part of EFA, something that had been neglected at Jomtien in 1990. In 2000, disappointed that the 'Dakar Forum' had again overlooked the matter, IWGDD set up a task force to campaign on the issue. Its participation in the present meeting is evidence of some success.

Theme 2
'Including the excluded'

The discussion of the meeting's second theme, *'Including the excluded'*, follows in three parts. The first ranges over basic education for rural populations and rural development, education relevant for out-of-school children, and proper supports for teachers. The second discussion covers the rights of adolescents to forms of post-primary education appropriate to their conditions, education for people with disabilities and special needs, and emergency scholarship schemes to protect educational advances. The third part looks at the possibilities opened up by distance education, open learning, and the new ICT.

Sub-theme 2.1: Basic education for rural people

Education for the rural poor and rural development[1]

Lavinia Gasperini
Food and Agriculture
Organization (FAO)

It is universally accepted that *education* and *training* are essential components in any effort to reduce poverty. It is also well known that the *majority of the poor lives and works in rural areas.* Yet education and training for the rural poor have *paradoxically attracted declining resources* since the 1970s. Part of this decline was due to the complacency born of the success of the 'green revolution', which seemed to assure the world of sufficient food supplies. How misguided that was is highlighted by the statistics of the year

1. Gasperini, Lavinia; Charles Maguire, 2001, "*Targeting the rural poor: the role of education and training*", paper presented to the IWGE, Lisbon, Portugal, 19-21 November 2001.

2000, which estimate that some 36 million people died of hunger or of its immediate consequences, that among them, a child below the age of ten died every seven seconds, and that there are some 815 million undernourished people world wide. A second factor in the decline was the confusion between *agricultural* education and *rural* education. Planners implicitly assumed that rural populations are agricultural populations and overlooked both the variety of rural livelihoods and the fact that the burgeoning rural labour forces needed to generate incomes from off-farm work. Off-farm earnings now constitute on average 42, 40 and 32 per cent of total rural income respectively in Africa, Latin America and Asia. A third factor was the preoccupation with another burgeoning population, that in the urban areas, at the expense of the majority in the rural areas.

There is now a reviving interest in education and training for a rural development that encompasses all elements of rural life. Today's approach to rural development recognizes that there are many different stakeholders in what can be called the 'rural space'. This concept of rural development is not new: *what is different is the wide commitment to making it work this time.*

What would FAO like to see happen?

FAO believes that the following conditions need to be in place, if a substantial improvement in the quality of life is to be achieved for the world's impoverished rural populations:

- The donor community and developing countries combine for an all-out assault on rural poverty.
- Enhanced human capital in the rural space that can be employed and trained especially for off-farm rural employment opportunities.
- Increased availability of off-farm employment.
- More investment in education, infrastructure, communications, health care, all essential enabling factors for sustainable rural development.

- Provision of better survival skills (life skills) for those who choose to remain in the rural areas and for those who decide to migrate to urban settings.
- General practice of sustainable agriculture and natural resource management.

If nothing is done, we can expect:

- *More* negative exploitation of natural resources as the rural poor move into forests or other protected areas in search of cropland.
- *Continuing* degradation of land leading to erosion and watershed deterioration.
- *Lower productivity* by the farming poor.
- *Increased* rural-urban migration compounding already serious urban poverty and social problems.
- *Deepening* rural poverty.
- *More widespread* under-nourishment.
- *Social unrest.*
- *Postponement* of sustainable rural development.

An initiative

In an effort to help revitalize education and training for rural development, FAO is in partnership with the IIEP in a Study of cases that demonstrate the possibilities of successful change, as in Colombia and Cuba. The Study will generate a resource document, which will form the basis of regional workshops during the latter half of 2002. *The aim will be to stimulate Member States to analyse their own systems and to design appropriate measures to regenerate education and training for rural development.*

Why now?

Three factors combine to create a favourable climate for reviving education and training for rural development. *Firstly*, the current interest in *Poverty Reduction Support Programme* (PRSP), particularly in the context of *Highly Indebted Poor Countries initiative for debt reduction* (HIPC), targets poverty throughout a country and requires the co-operation of all stakeholders. It offers a means of overcoming tendencies to non-co-operation between public agencies such as ministries of agriculture and education. PRSP also attract support from agencies like the World Bank in the form of *Poverty Reduction Strategy Credits* (PRSC) – *Poverty Reduction Support Programme* (PRSP) – and thus create incentives to treat education and training as instruments for poverty reduction.

Secondly, the current trend to decentralization pushes decision making and resources closer to rural areas, where there may be stronger probabilities of identifying the most appropriate initiatives in education and training and of actually implementing them.

Thirdly, the threats that the globalization of markets poses to the prices of agricultural products and thus to the survival of small farmers, are galvanizing governments into helping their producers become more competitive in terms of production, quality control and marketing. Education and training are central to such efforts.

How the IWGE could help

Participants at the meeting could take the issue of education for rural development back to their Agencies and:

- *Take the time* to review the FAO/IIEP study, when it appears in mid-2002.

- *Participate* in the Conference that FAO will convene to launch the findings and recommendations of the study.
- *Put education and training* for rural development on their Agencies' agenda and on the agenda for discussions with partner countries on PRSP and SWAp.
- *Consider funding* the cost of a process workshop reviewing how education systems address the needs of rural livelihoods, with a view to promoting larger investments in access and quality education for rural development
- *Provide* the international community with education statistics disaggregated by urban and rural areas.

Out-of-school children and relevance in education[2]

Digby Swift, Department for International Development (DfID)

The preceding plea for *'Education for rural development'* led easily into the following review of what would constitute relevant education for rural development. As with the adult populations, the bulk of the 113 million children not enrolled in school live in rural areas and 60 per cent of them are girls. About a quarter of them have actually enrolled in primary schools, but left without completing their courses. Part of the explanation for non-enrolment and dropout is that the pupils in question, and their families, for one reason or another find schooling irrelevant to them.

Efforts to design education relevant for such children have had a long history stretching back at least a century. But all seem to have disappeared into the dust. In current parlance, they proved *unsustainable*. Tracing the causes of these apparent failures requires first that the meaning of the term 'relevant' be unpacked. "*What are the dimensions of 'relevance' for a poor*

2. Swift, Digby, 2001, "*Reaching the remainder by making education more relevant*", paper and slide set presented to the IWGE, Lisbon, Portugal, 19-21 November 2001.

rural family with children – both boys and girls – who have the right to be enrolled in and regularly attending primary school, but who are not doing so?" The question is all the more engaging, since it applies only to a minority: the vast majority of the millions of children classified by UNICEF as living in poverty *are* in school. Possibly the affected poor are the very poorest.

A school education is not relevant to a very poor rural family, if:

- The expenses it entails in fees and/or other charges exceed what the family can afford in cash or offer in kind.
- The family needs the children's labour to sustain the household and the school's timetable deprives the family of that labour. Rural children are after all twice as likely as urban children to be economically active.
- The level of malnutrition, sickness or disablement in the family puts regular attendance out of the question.
- The distance from the home to the school is so great as to put the safety of the family's daughters at risk.
- The probabilities of access to secondary schooling are so small as to make even primary school appear not worthwhile.
- The family belongs to an ethnic or nomadic minority, while teachers from a dominant majority, who do not understand the family's language or culture, staff the school.
- The experiences of the children at the school suggest to the family that nothing useful is being taught or learned i.e. *that the quality of the education is poor and the children are wasting their time, when they could be helping the family.*

For almost all countries at present, a school education is insufficiently relevant, if it fails to enable its learners to understand some of their prevalent health problems and to take appropriate action to mitigate them; and, in particular, to help them understand the dynamics of the HIV/AIDS pandemic

and how to combat them. In parallel, there is the counselling and material support that should be provided for AIDS orphans, particularly those who have to care for, and cope with, younger siblings.

For countries in situations of conflict, for a school education to be relevant it would need to provide psychosocial support in all phases of emergency and reconstruction, to guide children in participating in community-based relief, recovery and reconstruction programmes and in mobilizing local care systems. In addition, the education would focus on supporting children with special needs, such as child soldiers, in programmes for integrating all war-affected children and for preventing the institutionalization of war orphans. Further, to enable schools to be effective tools for reconciliation, the education system needs to *demonstrate greater equity* in school support and funding, so that the schools are not themselves sources of conflict.

To achieve relevance from these different perspectives and on all these dimensions requires a broad systemic approach that addresses four central components: (i) school management, (ii) school structure and location, (iii) teacher recruitment, training and management, (iv) the curriculum.

School management

A school will become much more relevant to its local community, if the latter have a say in its operation. *School Management Committees* (SMC) and *Parent/Teacher Associations* (PTAs) are keys to integrating the school with the community. Provided steps are taken to ensure a democratic, poverty-sensitive process, which avoids domination by local elite, such committees should be given the flexibility to make the school more relevant to pupils and community and more effective in inducing the poorest families to enrol and keep their children in school.

An important aspect of school management is *finding*, *paying* and *retaining* teachers. Ministries of education often have difficulty in persuading officially qualified teachers, particularly women, to take up and stay at posts in remote and isolated rural schools. They tend also to be reluctant to hand the earmarked salaries over to Community School Management Committees, along with the authority to recruit and pay locally-based people, who could be trained to become competent teachers. Consequently, communities are left without schools. There is a *strong case for decentralizing responsibility and finance here.*

School structure and location

The structure and location of a school can have a major impact on its ability to interact with, and become relevant to, the community. A village cannot have much impact on a school that is located a long way off, or on one that needs specialized skills, tools and materials for its maintenance.

Teacher recruitment, training and management

Teachers can have the dominant impact on the quality of education. Yet a high quality teacher is not necessarily a formally highly qualified teacher. Less educated teachers, who are motivated, reliable in attendance, and seeking the best for their pupils can be equally effective, especially when they can rely on help from senior teachers or advisers. As teachers should ideally be part of the local culture, policy in teacher-training should allow for formally under-educated but intelligent school-leavers from poorer areas to be appropriately trained to become teachers in their own villages. Such an approach could also open the way to having more female teachers in rural areas: relevance is undermined, when half the pupils, but less than a tenth of the teachers, are female. Instructive examples come from the work of the *Bangladesh Rural Advancement Committee* (BRAC) and the UNICEF funded community schools in Egypt.

At the same time, teachers need educated colleagues they can interact with, and 'teachers' villages' or centres within reach of a number of schools can constitute a relevant compromise.

Teacher-training needs to take more account of skills needed to provide a relevant education, including, for example, teaching in multigrade classes, enabling pupils to develop writing and reading skills from local customs, histories and proverbs, using local materials to illustrate mathematical or scientific principles, capitalizing on local resources, while satisfying national criteria for substance and quality.

The curriculum

'The curriculum' may be a misleading term, since the essence of relevance is the flexibility to ensure that the curriculum of a particular school fits the requirements of particular sets of pupils such as (i) those in remote locations, (ii) minority groups, (iii) child breadwinners, (iv) children with disabilities, (iv) children in conflict situations, (v) children dealing with the repercussions of HIV/AIDS, and (vi) girls where female education is not highly valued. All of them need the basics – *numeracy, literacy and opportunities for creativity and problem solving* – but this through media that *'speak to their own realities'*, rather than through a rigidly standardized *'national curriculum'*.

A 'national curriculum' sometimes entails national examinations that determine successful graduation and possibly selection for further schooling. They can thus define the 'real', as opposed to the 'intended', curriculum, and so constitute an *additional and very difficult challenge to making the curriculum locally relevant.*

Arguing for relevance through localization is not to ignore the long history of attempts at it through *rural/agricultural* education, *environmental* education, *science* education, *technology and vocational* education, *practical subjects*

education, *design technology*, *health* education and *building* on the foundations offered by Koranic schools. Nor is it to deny the difficulties of taking a small and successful experimental or pilot project to scale. Rather, it is to advocate learning from those many attempts, so that the factors that 'caused them to founder' can be eliminated or avoided. The major lessons seem to be:

- *Avoid* requiring additional expensive equipment and materials.
- *Avoid* overloading an already heavy curriculum with new subjects or topics without some compensatory reduction of older topics
- *Adopt* a systemic 'whole school' and community approach.
- *Accommodate* cultural inertia in the values and status that examinations, teachers and parents ascribe to some subjects at the expense of others.
- *Take care* of the concerns of senior teachers and community leaders about maintaining their own status.
- *Take into account* the working conditions, morale and aspirations of teachers.
- *Take care* to balance needs as perceived by parents and pupils, on the one hand, and, on the other, needs as perceived by senior education policy makers.
- *Take care* to balance immediate with longer-term priorities, the local with the global, the traditional with the modern, and the needs of school-leavers with those going on to further schooling.
- *Take care* that an initiative is developed within a SWAp, so that there is co-ordination with other initiatives and sufficient *monitoring, follow up and support.*

Overall, the greatest successes have been achieved through enabling and supporting local initiatives, whether by NGOs or other agencies, increasing interaction with the local community and using a child-centred approach. "*Local teachers with modest training but supported by their communities have achieved results at least comparable with more highly qualified and better paid mainstream teachers*". More extensive success stories such as

BRAC and *Child-to-Child* (CtC) show that the sustained pursuit of relevance requires increased monitoring, co-ordination and sharing of experience on individual local initiatives.

Keeping the teachers in mind[3]

Yumiko Yokozeki, Japanese International Co-operation Agency (JICA)

The preceding presentation drew attention to the plight of many teachers: they feel "*ill trained, ill supported, ill paid, irregularly paid, insecure, burdened with an impossible teaching load, and saddled with expectations that they should be leaders among their communities*". Yet everybody recognizes that teachers are a crucial, indeed *indispensable*, element in ensuring that any reforms to include the 'excluded' in education are implemented successfully. Education for rural development, special education, remedial education, encouraging community participation, flexibility in school management and lesson delivery, the very quality of education, depend utterly on the teachers. Nonetheless, few people seem to recognize *that the teachers are themselves among the excluded.* On five important dimensions, they are a disadvantaged group.

Economic status of teachers

In comparison with what is expected of them, both in school with their pupils and an ever-expanding curriculum, and out-of-school as members of their communities, and in the light of the conditions under which many rural teachers have to live, teachers *receive relatively low salaries*. In a number of countries, they have to endure delays in receiving what they have worked for and to put up with irregular payments. When salary reforms are promised, they usually take a long time to be produced. Teachers in rural schools suffer

3. Yokozeki, Yumiko, 2001, "*Teaching profession: including the excluded teachers*", slide set created for the IWGE meeting, Lisbon, Portugal, 19-21 November 2001.

from these delays and irregularities more than their urban colleagues. In addition, they have to put up with poorer housing, difficult water supplies, primitive sanitation, lack of electricity, arduous access to amenities, generally inferior living conditions and more severe problems of transport.

Academic status of teachers

Possibly because of the inferior economic status of teachers, teacher-training colleges are often regarded as glorified secondary schools, or at best, post-secondary rather than tertiary institutions. Consequently, teacher-training courses are usually the second or third choice of school-leavers and tend to be unattractive to the more able students. Further, certificates, diplomas and degrees in teaching tend to be regarded as inferior to qualifications in other fields, while progress in the profession itself is often used as a way out to 'greener' fields. In the case of Ghana, for example, after three years of training, a teacher can teach in primary school for three years, then apply for three years of study leave to take a diploma. Teach for another three years, apply for more study leave to take a degree, then use the degree to shift into another career with higher status and monetary rewards. In effect, nine years of training and 15 years of salary produce only six years of teaching in primary schools.

Professional status of teachers

In many countries, the erosion of the professional status of teachers is reflected in the occupational preferences of students and in the perceptions of parents. Both groups see the teaching profession as a last resort for young people, who cannot gain entry to other professions. That means that the profession is attracting people who regard it as almost a makeshift that will suffice, until they can move on to something better.

Added to that is, of course, the rural-urban divide: teachers, especially primary school teachers, who are offered rural postings, tend to be regarded as not the best of their groups – the best go to the better esteemed urban

schools, where supplies of teaching materials are more plentiful and support more forthcoming, and where, of course, living conditions are more comfortable. Rural primary schools in effect receive the least recognized of a group of young professionals, who feel at the very outset of their careers, *unrecognized, unappreciated, poorly rewarded and badly treated.*

Information status of teachers

For people to stay abreast of and understand changes that will affect them, they need access to information on what is afoot. On this point, rural teachers are at a severe disadvantage, for nobody in the ministries of education, provincial or district offices takes much trouble either to keep teachers in the classrooms informed, or even to let them know where and how to obtain the information. The current wide drive for decentralization and community management crucially affects rural teachers and the way they work, yet they seem to be the last to hear and be aware of plans, let alone enjoy an opportunity to discuss the implications for themselves and their pupils.

The teachers cannot rely even on the radio or other mass media, for these are urban-centred and, in the case of newspapers, seldom reach the rural areas in good time. Also, the information contained in broadcasts and articles tends to be superficial and incomplete.

Although an argument can be made that teachers should take some responsibility for obtaining the information they need, teacher-training courses do not necessarily include *any guidance on how to set about acquiring it.*

Status in the reform process

Despite discussions of democratic participation and 'bottom-up' development, most current processes of educational reform are 'top-down'. The changes are virtually forced upon both teachers and the communities that are supposed to benefit by taking charge of their children's education.

Mechanisms for bringing in the teachers' voices are lacking, even though the effectiveness of the reforms depends on the co-operation of the teachers. This situation of course reflects the devaluation of teachers as a profession.

Sadly, much reform appears to be driven more by personal or party political agendas, than by concern for the quality and effectiveness of schools or the well being and effectiveness of teachers.

Reversing the situation

A start in *reversing this unfortunate situation* could be made with the *reform process*. National and regional channels for sharing information with the teachers and using teachers' organizations to ensure that the information is thoroughly shared will enable teachers to make informed, reality-based and thoughtful contributions to the process. *"Bringing in the teachers, consulting them, creating mechanisms for even the most junior in the most remote rural schools to state an opinion"*, would soon raise their perceived status as a *vital, intelligent and responsible* profession. Enhancing their socio-economic status through better living conditions would signal that they are a 'valued profession'. Arranging more and better opportunities for further education, along with institutionalizing regular in-service training, would raise their standing as a *well-educated and progressive profession.* In Ghana, for instance, the Government, in co-operation with the Ghana *National Association of Teachers*, offers teachers, who have failed their examinations or who have been referred, special upgrading courses to enable them to take up their posts as properly qualified professionals. During 2000, nearly 1,100 teachers took part.

As the previous presentations stress, what the situation requires are *holistic, systemic approaches to the teachers' roles* in fully functioning systems. Quite apart from reviews of salary scales in the light of what the teaching profession is expected to contribute to a country's children and communities – particularly rural children and rural communities – incentives

need to be devised to keep teachers teaching and *rural teachers teaching in rural schools*. Means need to be developed to keep *teachers informed*, learning and *abreast of advances* in their fields – the potentials of *Information and Communication Technologies* (ICT) and *distance education* are yet to be fully capitalized. The issue of professional status and how to make teaching a profession attractive to all, rather than a last resort for the less able, needs advocacy.

Teachers, particularly teachers in remote, poor rural communities, can help to include the 'excluded' in their societies' operations and development. But the *teachers must themselves first be included* and inclusion must be an *ongoing, continuous process*, rather than a once-for-all result. If teachers are to help empower their pupils and communities, ***their own empowerment is essential***.

General Discussion

A disturbing aspect of the three presentations (i) education for rural development, (ii) relevance in education and (iii) the 'exclusion' of teachers is that the issues they touch on have been the focus of wide and intensive discussion for close on half a century! *Solutions for dealing with them have been often repeated, but apparently not implemented.* The concept of community schools, for example, goes back a long way, but has seldom worked out as productively as had been hoped. The reason may well be that only more recently has it been associated with the concepts of decentralization, capacity building and empowering schools with the resources to decide local matters. Similarly, if less radically, the idea of flexible school calendars to accommodate different agricultural cycles has been mooted for decades: why has it not been widely adopted for rural schools? Where it has been mentioned as a possible option, as in the recent *Lok Jumbish Programme in Rajasthan*, India, both teachers and parents have resisted it. On the issue of distances from schools, what kinds of supports do families and communities need? Some proposals to mitigate the problem have been blocked by heads of schools and the school inspectorate.

On the other hand, the ingredients for creating and sustaining relevant and effective schools with committed and reliable bodies of teachers are now well established: as work in Brazil has shown, there are really only four or five essentials to achieve good schools – in fact, complexity is an enemy. Cuba, too, has demonstrated that appropriate combinations of capacity building, incentives and supports produce effective education, while Colombia's effort at linking teacher training to rural policy appears to be paying dividends.

Another persisting truth is that the disparities between rural and urban areas are especially hard on schools and may be more important even than the disparities of gender within schools. The strategies to deal with them need to be geared to the demand for schooling and to be flexible in the face of widely varying circumstances. For this, decentralization is certainly essential and, along with that, the appropriate and reliable transfers of resources. As for teachers, local recruitment is preferable to postings and transfers arranged by central authorities.

To enable local communities to participate in, and manage, decentralization effectively – along with all it entails in terms of allocating resources, recruiting and supervising teachers, securing teaching supplies, maintaining school buildings and facilities – help and capacity building are indispensable. Indeed, the help and capacity building may need to start at the level of basic literacy and numeracy classes for community leaders and the families of pupils.

This brings in a dimension *not explicitly* treated by the three presentations, but *vital* nevertheless, namely, *adult education*. Without programmes of non-formal education for the adults, partly to compensate for past inadequacies in schooling, efforts at decentralization and community management will be hamstrung. Such programmes need not be shouldered by ministries of education, nor necessarily standardized across a country. They could be organized by NGOs or CBOs around needs and issues important to particular communities. Educating the adults may also have the effects of facilitating the

enrolment of girls in primary schools and of eliminating the problem of motivating families to send, and to keep their girls in school.

Also not treated explicitly is the issue of the *language of instruction* in decentralized, community-managed schools and in localized adult education. Although not finally resolved, the consensus seems to be that, even in science, the language of instruction should be a language that is at least familiar to the learners, whether children or adults. Mastery of one language, and reading and writing in that language, does generate transfer effects in facilitating 'learning a second language'.

Possibly what is needed to address these long standing issues more effectively is a fresh analytical framework to take account of all the stakeholders and the whole environment within which the problems occur. For a start, responding to four questions may ease the way forward. *First*, to what extent are the problems caused by the lack of resources, rather than by deficiencies of political will, cultural or institutional inertia or resistance from particular stakeholders? *Second*, what *are* the current core basics of basic education in any school? *Third,* in what ways are the current basics identical to or different from those of thirty years ago? *Fourth*, in the drive for decentralization and community management of schools, how will a proper balance be achieved and maintained between the local, the national and the global?

Sub-theme 2.2: Education for specific target groups

Educational opportunity for adolescents[4]

Mary Joy Pigozzi,
United Nations Children's Fund
(UNICEF)

How well adolescents are educated and prepared for their adult roles will be a crucial element in how well humanity as a whole copes with the challenges of the 21st century. However, although UNICEF and its partners have worked on adolescent issues since the early 1990s in a variety of ways, no policy framework as yet focuses these efforts into coherent strategies or programmes. Nevertheless, UNICEF understands that the *'Convention on the Rights of the Child'* and the commitment to 'Education For All' oblige it to give more attention to the educational needs of adolescents, even while its *major priority must remain basic education for children of the conventional primary school age range.*

In developing countries, around 55 per cent of the boys and 46 per cent of the girls aged between 12 and 19 years are enrolled in secondary schools. Quite apart from the need to multiply the number of secondary places, the challenge here is to have the curricula incorporate education that deals with a range of issues faced by adolescents: gender disparity, the abuses it permits and the various kinds of damage it generates – HIV/AIDS and STDs, early marriage, unwanted adolescent pregnancies, abortions – the risks of alcohol and drug abuse, the risks of tobacco[5], reckless road use, impulses to suicide, homicidal conflict between young males. Not to mention the need and right to participate constructively in their societies; The other half of this adolescent population is for the most part at work, for adolescents are both dependent on

4. Pigozzi, Mary Joy, 2001, *"The right of adolescents to education"*, paper prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November 2001.
5. An estimated *300 million* adolescents use tobacco: some *150 million* of them will likely die of tobacco generated diseases later in life.

their families and, particularly in poor families, an increasingly important resource in augmenting family income. Most of the work takes the form of family and self-employment, and some of it can be exploitative, especially for girls. Reaching and enabling them to acquire the information and skills to deal with the issues listed above, as well as the information and skills to earn better incomes and lead healthier lives are even greater challenges than those posed by the adolescents in school.

Working on education for both these groups has brought UNICEF to an improved understanding of what quality in education involves. Five dimensions require attention:

- *What the learners bring* to the learning environment. With adolescents, what they bring can be either challenges or resources.
- *Learning content*, which needs to include education on rights, gender, equality, health, HIV/AIDS, peace and respect for and appreciation of diversity, in addition to the usual skills for life and employment, whether as a salaried or self-employed person.
- *Learning processes*, which should include opportunities for adolescents to learn from each other, to work in groups or teams and to learn on their own, as well as to learn from their teachers.
- *Learning environments*, which should be secure, safe, non-violent, clean and hygienic, if possible with health and nutrition services in the vicinity.
- *Learning outcomes*, which, as indicated under content, should include more than reinforced literacy, numeracy and life skills. In addition to the outcomes, there need to be measurable indicators of their attainment.

UNICEF is working with adolescents in many ways and has accumulated a broad range of experience, though with insufficient depth in most areas. It has been strongest in the promotion of life skills, but has also helped develop models of *'second chance/catch up'* education, particularly for girls, and models to promote the right of adolescents to participate in their communities' efforts at sustainable and secure human development.

UNICEF is about to start implementing its new *Medium-Term Strategic Plan*. Girls' education takes the lead role, but the issues just discussed are not neglected. How UNICEF strikes the balance between advocacy, policy and implementation on each remains to be seen.

Inclusion and educational opportunity for those with disabilities and special needs[6]

Tony Davison,
British Council

Children and young people with disabilities are disproportionately represented among the excluded. An example from Ethiopia is that in the mid-1990s less than 1 per cent of all children with disabilities had the opportunity of primary schooling. Yet there is still controversy about paying special attention to such children. A frequent question is *"Why are you putting in so much effort for the disabled, when the majority of even normal children are not in school?"* The attitude behind the question is understandable, for services for children with disabilities always cost more than those for normal children. Thus, children with disabilities are threatened from two directions. On the one hand, decision-makers are tempted to cut these additional resources in times of economic pressure, while, on the other, poor parents can send only some of their children to school and are more likely to keep children with disabilities at home.

Even the Dakar 'World Education Forum' *failed to mention children with disabilities as a group of excluded children who needed special attention*. Advocacy and lobbying have now partially redressed that neglect, as the High Level Group on Education has called for a reversal of the *"neglect of vulnerable and disadvantaged groups, including individuals with disabilities"*.

6. Savolainen, Hannu, 2001, *"Including the excluded – Focus on children with disabilities"*, paper prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November 2001.

Societal attitudes towards people with disabilities have fluctuated with cycles of economic development. When times are good, everybody is a potential contributor and worth investment. In depressions, marginalized people become burdens on the economy and services for them are cut. To counter these fluctuations, strong stakeholder groups and advocates are needed. Education is a basic human right from which nobody should be excluded. Therefore, all children – including children with disabilities – do have an undeniable right to free public basic education. Although this should be clear and self-evident, it seems that decision- makers need constant reminders that only organisations of persons with disabilities can launch and sustain effectively.

The current climate shows contrary trends. The movements for human rights, EFA and people with disabilities are positive. More negative are the trends towards reducing medical care to mechanical rations and summaries of treatments given or days of hospitalization, towards separating individuals too easily into *'normal'* and *'deviant'* categories, and towards genetic manipulation and preventing the birth of children with disabilities. More ambivalent is the promotion of what is called *'inclusive education'*.

What is precisely meant by the term is still far from clear. Because of that and because of abuses of what was earlier called *'integration in education'*, some parents, organizations and teachers seriously question inclusive education, demanding to know what will guarantee children with disabilities the educational services to which they have the right. *Does Education For All really mean All?* The debate on which groups of excluded children should be specifically mentioned in the Dakar 'Framework of Action' illustrates the difficulty of defining what *'All'* means. The challenge of inclusive education is to guarantee that children with disabilities will not be overlooked, when there are so many other excluded children demanding attention. Any comprehensive programme of reform will tend to develop a system that best serves the vast majority, which is to say the so-called *'average children'*. Understandable as that is from the pedagogical and economic points of view, indicators of the average may hide contrary and perverse developments for different minorities of

students. This then argues for an even higher priority for less advantaged children, as they are likely to suffer most, if *'average development'* drives the primary approach.

Preserving positive developments in ideologies related to disabilities requires keeping in mind the opposed tendencies discussed above and being realistic about the steps that must be taken to develop education for all children. One indication of realism is recognizing children with disabilities as a 'Focus Group' requiring special attention in education. A second would be the acceptance of the following four assumptions as axioms. *First*, inclusive education is more a process than a goal that can be fully attained. *Second*, the process will be gradual, rather than overnight. *Third*, succeeding in the process will require working with local knowledge and practical possibilities, not a sudden or total replacement of the old with the new. Finally, and most important, at every stage there must be strong stakeholder ownership of the process.

Jerome Mindes,
International Working Group
on Disabilities and Development
(IWGDD)

As explained in the *'Show and Tell'* session earlier, what provoked the IWGDD[7] into existence was the *failure* of Jomtien, and *subsequent discussions* and *programmes* of EFA, to *take children of disabilities into proper consideration*, despite the clear disability dimension to each of the Dakar goals. This neglect prevailed, despite distressing statistics, such as *'that the illiteracy rate among blind people approaches 95 per cent'*, and distressing practices, such as the exclusion in Bangladesh of 'children uneducable due to disability' from a school mapping exercise. Although the situation is slowly improving, it is essential that those interested in international development commit to working as partners to ensure the inclusion of those with disabilities from the very outset of life – in programmes of *Early Childhood Care and Development* (ECCD), for example,

7. Mindes, Jerome, 2001, "*International working group on disability and development*", paper prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November 2001.

since the special needs of some children with disabilities will be dramatically compounded, if they do not receive *Quality Early Childhood Care.*

WHO estimates that there are some 600 million people with disabilities in the world and that 480 million of them live in the developing countries. UNICEF estimates that there are 140 million children with disabilities. However, the data are scarce on how these people with disabilities are distributed, or on any disparities by gender, geography or social class. In the UK and USA, surveys have established that of every thousand persons, two are blind, two have hearing disabilities, 11 have disabilities of the intellect, and so on to a total of 35 to 37 in every thousand suffering some form of significant, obvious disability, – i.e. more than 2 million in the UK and more than 10 million in the USA – and these do not include children with learning and emotional disabilities. Pilot studies of this kind are needed in the developing countries. Without them, children with disabilities will continue to be excluded from schools with no provisions to facilitate physical access and with teachers ill equipped to deal with their needs.

To make progress, alliances need to be formed with proven effective advocates, such as the parents of children with disabilities, to organize local, national and global forums to raise people's awareness of the need and mobilize their commitment to ensure that '*EFA really does mean for all and includes children with disabilities*'. National plans for education do need to include explicit provisions for these children and, on a global scale, the international community needs to insist incessantly that the imperative for real *EFA must recognise their existence, their variety and their special needs.*

Sustaining inclusion for people impacted by economic crises[8]

Tony Davison,
British Council

In 1998, following an economic crisis, the Government of Indonesia introduced a temporary scheme of scholarships for poor primary and secondary school pupils and block grants for private primary and secondary schools that served relatively poor populations. The objectives were to maintain *enrolments*, maintain the *quality* of education and *prevent* the closure of schools. To implement the scheme, the Government borrowed US$ 390 million from multilateral lenders and allocated US$210 million of its own money, a total of US$600 million, or 27 per cent of its education development budget. Its grants to the schools amounted to between 20 and 39 per cent of the incomes of the recipient primary schools and between 28 and 50 per cent of the income of the recipient lower secondary schools. The expenditure was justified on wholly economic grounds, as an investment in protecting previous investments in creating the human resources required to meet the challenges of globalization and the *Information and Communication Technologies* (ICT) and sustain future economic growth and development. Considerations of welfare formed no part of the justification, so that the scheme embraced all poor students, not necessarily only the poorest.

What moved the Government to take this step was the experience of a previous economic crisis in 1986, when school enrolment rates at all grades fell for six consecutive years and took a further three to recover their pre-crisis levels, and some 2,000 private schools were forced to close. The severity of the 1997 crisis caused the Government to fear a similar regression in education and to move in quickly to head it off.

The essence of the *Scholarship and Grants Programme* was to target both poor students and economically poor schools. The students had to be

8. Davison, Anthony J., 2001, *"Indonesia's 1998 Scholarship and Grant Programme"*, slide presentation prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November, 2001.

already enrolled in upper primary, lower secondary and upper secondary schools and received a large part of the 'wherewithal' to stay in school, even if the crisis had disabled their families from continuing to pay for their education. The schools had to be private, serve relatively poor populations and be vulnerable to closure, should they lose students with their fees and therefore their means of paying for their staff and other expenses.

An evaluation of the effectiveness of the *Scholarships and Grants Programme* was undertaken in 1999. Despite a number of methodological difficulties, it was able to reach some conclusions. The first was that primary and lower secondary enrolment ratios for both boys and girls of all economic classes remained virtually steady between 1997 and 1999. Pupils from the poorest quintile remained marginally less likely to enrol than those from the richer quintiles, but, instead of showing a decline, actually achieved an increase of 3-4 per cent in 1999, as compared with 1997. *Prima facie* and despite a number of local anomalies, the first objective had been achieved.

Among the imperfections, the targeting of the scholarships seems to have been less than precise. Of those who received scholarships, only 25 per cent said they would certainly have dropped out, if they had not had the scholarships, while 42 per cent, nearly half, said that they had had no problems paying their fees – their scholarships may have been unnecessary. On the other hand, 40 per cent of those, who had *not* received scholarships, said that they did experience difficulties in paying their fees, even though not to the point of being forced out of school.

From another perspective, the targeting worked reasonably well in primary schools, where nearly half the recipients came from the poorest quintile of families, and about 12 per cent came from the two richest quintiles. It worked less well in junior secondary schools, where a third of the recipients came from the poorest families and a full 20 per cent came from the two richest quintiles. It worked even worse in upper secondary schools, where

fewer than 20 per cent of the recipients came from the poorest families, while 34 per cent came from the two richest quintiles. These statistics could well explain why some of the pupils felt that they had not needed their scholarships.

A third aspect of targeting concerns the primary schools. The scholarship and grant scheme applied only to the three later years of the primary course, grades 4, 5 and 6. The Government's reason for this was that children do not begin to drop out in serious numbers, until the end of grade 4, which suggested that families met no difficulties in finding the 'wherewithal' to finance grades 1, 2 and 3. It assumed that the major cause of dropout in the later grades was economic. However, earlier studies had shown that dropout in later primary was more a function of *failure and repetition* – i.e. institutional practice – than of family economics. Adjusting practice might have sustained enrolments and also reduced the costs of the programme, which would have enabled the government to undertake smaller loans and to make smaller diversions from the development budget.

A further point about targeting was the paradoxical observation that some agricultural and mainly rural provinces, despite not being severely affected by the crisis and, on the contrary, enjoying something of a boom in agricultural exports and in addition receiving scholarships and grants, nevertheless experienced a fall in enrolments. The explanation was thought to be the export boom: it increased the opportunity costs of keeping able-bodied young people in school.

The preceding points concern the scholarship side of the programme. On the grant side, the second firm finding was that, although many schools had suffered declines in income – by as much as one fifth on average in junior secondary schools – very few had actually closed, so that the loss of capacity was insignificant. *Prima facie*, then, the programme had achieved its second objective also.

What did decline were the rates of transition between primary and junior secondary and between junior secondary and senior secondary. The explanation could have been the design of the programme itself: it assured scholarships for the level at which pupils found themselves already enrolled, but not for the transition to the next level. This very likely meant that poorer families felt that, given the prevailing economic climate, they could not risk undertaking new and heavier burdens of fees and other expenses, which they might not be able to sustain.

Whatever the anomalies and possible influence of unidentified factors, major credit must undoubtedly go to the programme for the attainment of its two main objectives. *"What lessons then might other countries draw from this Indonesian initiative to use a scholarship and grant programme to sustain educational inclusion and capacity in the face of a severe economic downturn?"*

First, interventions by the state to protect education from possible negative impacts from economic emergencies can constitute useful investments.

Second, in the case of a large country with a heterogeneous economy, it is desirable to assess, however, the likely economic impacts in different geographic and economic regions, so that those most negatively affected receive the most help.

Third is the well-established lesson that the aims of a programme should be clear and precise, with the priorities between the aims firmly defined; and that all stakeholders should understand them thoroughly.

Fourth is the nature of any targeting: the programme should be clear on whether it aims to target individuals with particular characteristics, particular school populations, particular schools, particular schools in particular regions, or particular levels of schools.

Fifth is the desirability of identifying the precise nature and causes of bottlenecks in the system – e.g. the reasons for dropout, the factors influencing transition to higher levels of schooling – so that the programme addresses them appropriately.

Sixth, as the issue of fairness is endemic in schemes that target individuals, great care is required in designing a programme that both beneficiaries and non-beneficiaries will consider to be fair.

General Discussion

The cases of education for children with disabilities and the Indonesian *Scholarships and Grants programme* illustrate the point that education serves human development in *both its social and economic dimensions*. They also highlight the constant balance that strategic thinking has to maintain between an overall systemic perspective and a systematic approach to the disaggregated parts of the system. Similarly, they underline the unavoidable reciprocation between considerations of human rights and possibilities of practical solutions. The educational rights of people with disabilities may have to be honoured only incrementally, starting with the partially disabled, whose needs may be easier and cheaper to satisfy, then, as expanding resources permit, moving on to the more disabled. Correspondingly, the Scholarships and Grants Scheme aimed to help all the poor, not just the poorest, stay in school, but apparently had to accept that practical administration would in some instances benefit more the better off.

The principle of scholarships does not of course need to be restricted only to countering the possible effects of economic shocks. Bangladesh and Honduras use it successfully to promote the regular education for girls from poorer families. It could be applied more widely and equally successfully to the education of children with disabilities. The principle of grants to schools, even in normal circumstances, clearly operates through a number of NGOs like the *Aga Khan Foundation* (AKF), to name just one.

As regards people with disabilities, there was clearly a vast gap in knowledge about the actual situation. That predicated a gap in knowing what might be appropriate for different kinds of disabilities, what might be feasible, what might be effective and what might prove to be the limits of inclusion. Might different strategies be required for different disabilities? In the light of inadequate knowledge and expertise and the competition for available resources, pragmatism rather than dogmatism seemed the prudent course for the situation. That said, prudence and pragmatism are not synonyms for inaction and there needs to be sustained dynamism in pursuing the satisfaction of the *"rights of all humans to education, social, political and economic inclusion, so that no talent is wasted"*.

Two strategies are conceivable. *One* is the path of uneven development, starting with the able and more talented, then working round to the rest. *The second* is to include everyone from the beginning, enabling each to take a small step or two forwards. All excluded groups are now aware of what they are missing and not getting. There is a risk of education for frustration with possible dire consequences.

As regards protecting education from sudden economic crises, the desirability of having reserve funds available to insure against the erosion of past gains and progress is clear. Although Indonesia and Argentina have borrowed money for the purpose, such an approach is likely not feasible for the long term. However, governments could consider establishing special endowment funds to deal with the kind of contingency faced by Indonesia in 1997-1998: although the participation of multilateral lending institutions may well be precluded, the basis of contributions and disbursements could be worked out within each society and possibly with bilateral donors, other agencies and private philanthropists.

Sub-theme 2.3: The role of new technologies for reaching the excluded

Inclusion by distance education and open learning[9]

Françoise Caillods,
International Institute for
Educational Planning (IIEP)

The gradual increase in primary school enrolments, coupled with the slower growth of modern sector labour markets and job opportunities, has generated increasing growth in secondary school enrolments. In addition, recognizing that primary schooling is inadequate for the requirements of globalizing economies and the 'new information society', many countries in Africa, the Arab States, Asia and Latin America have expanded their basic education cycle to encompass nine rather than six or seven years. However, the cost of achieving and sustaining *Universal Primary Education* (UPE), while expanding participation in secondary schools could turn out to be very costly, particularly for African countries. To expand enrolments while containing costs, many governments are resorting to a range of devices, while private secondary schools are 'mushrooming'. The results are a deteriorating average quality and widening disparities between urban, peri-urban and rural areas, as well as between genders and social groups. Those who still do not have access to secondary education *(not to mention those who do not have access to primary education)* are thus excluded from school, labour markets and the new information society.

In efforts to counter this, several countries have developed 'open learning' and 'distance education' as an alternative to conventional secondary schooling. The programmes have similar objectives:

9. Caillods, Françoise, 2001, *"Distance education and open learning: a chance for the excluded at the secondary level?"* paper prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November, 2001.

- *to provide education* to those who are excluded from conventional secondary schools for geographic or economic reasons (having to work and/or being unable to pay the fees);
- *to provide quality* and relevant education at a reasonable cost;
- *to consolidate* what the students have learned at primary school, enable them to continue their studies at higher levels and provide them with the necessary skills to develop their communities;
- *to compensate* (in some cases) for the lack of trained teachers and facilities;
- *to reduce* the burden of financing secondary schools.

The cases of Argentina, Mexico, Indonesia and Zambia provide some information to help assess the effectiveness of such initiatives[10]. In size and scope, they vary from an enrolment of 900,000 in Mexico – 18 per cent of all lower secondary school enrolments – to some 21,000 in Zambia. Unit costs range from 16 per cent *more expensive* than conventional secondary schools in Mexico, where television is used to support the course, to 75 per cent *less expensive* in Indonesia.

While all four countries offer curricula equivalent to those in lower secondary schools, only Argentina, Indonesia and Mexico provide truly open programmes, in that anyone qualified to enrol may do so. They also aim to include young people disadvantaged by poverty or geographical location, charge no fees and provide learning materials free-of-charge. Zambia, where the Gross Enrolment Rate for secondary education in 1996 was only 17 per cent – as compared with around 50 per cent in the other three countries – still has to impose a selection mechanism in the face of overwhelming demand as well as to charge fees for participation. In addition, it no longer manages to provide learning materials to its students and has ceased to offer supporting radio

10. Besides these four countries, the IIEP has commissioned additional studies in Brazil and India.

broadcasts. In effect, Zambia's programme caters for the middle income groups, and the quality of the education provided is questionable.

All four countries use classes organized and supported by a single facilitator, often a primary school teacher with supplementary training, and requiring daily attendance. All recognize the need for *interaction* between learners, as well as with the facilitators, to *promote learning* as well as to *sustain motivation*. All also attach considerable importance to self-learning. Printed learning materials form part of the curriculum, along with regular visits and teaching by subject specialists from nearby secondary schools. In the cases of Indonesia and Mexico, television, radio and video programmes are part of the standard curriculum, while Argentina and Zambia rely only on printed materials.

In terms of effectiveness, all four programmes do somewhat less well in retention, completion and pass rates than the conventional secondary schools. Nonetheless, Indonesia's retention rate is a very creditable 90 per cent, while Mexico's is a still respectable 77 per cent; no precise figures are available for Argentina and Zambia.

Similarly, progression rates to upper secondary school are also lower than those for conventional schools, running at around a quarter for Indonesia and Zambia. Considering the socio-economic profile of the learners, this is to be expected.

The quality of the programmes depends on four essential elements:

- *the motivation* of the facilitators and the training they have received;
- *the quality* of the teaching materials and specialized modules distributed;
- *the availability* and regularity with which teaching materials are distributed;
- *sound management*.

In addition, the use of a variety of media in Mexico and Indonesia does seem to enhance the quality and effectiveness of the learning. A side effect is that the specially prepared materials tend to be better than the ordinary textbooks and, in Argentina, are increasingly used in the regular schools.

In terms of cost-effectiveness, preparing special teaching materials and organizing the programmes makes the starting costs high, hence the fact it is organized in large countries. But once the programme is running, the unit costs (except in the case of Mexico) appear to be much lower than those of regular secondary schools (sometimes to the detriment of quality, as in Zambia).

Overall, provided that certain conditions are met – teaching materials are distributed, adequate links are formed with neighbouring conventional schools, and facilitators are trained, motivated and reliable – open learning secondary schools appear to be quite cost-effective, and can constitute a real alternative to regular secondary schools, particularly when it comes to enrolling adolescents from disadvantaged backgrounds. It may not, however, be a viable alternative to traditional schools in resource-poor countries.

Inclusion through online learning[11]

John Daniel, United Nations Educational, Scientific, and Cultural Organization (UNESCO)

"Can strategies for 'open' and 'distance learning' for disadvantaged adolescents in mainly developing countries contemplate harnessing 'online learning' for their clients?" Despite the focus on developing countries, the stage can be set by placing 'online learning' in the wider context of the evolution of 'distance education'.

11. Daniel, John, 2001, *"Online learning: evolution or revolution"*, paper prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November 2001.

The experience of the UK Open University will serve as the introduction. The university enrols a somewhat analogous population of people: they could not enter the normal university at the normal age, and were in that sense excluded. Currently, it is the world's largest Internet University, with some 150,000 students working 'online' from home. This is a large-scale operation, important for education policy-makers and administrators. Against this background will be set two examples of applications for out-of-school adolescents, one in India, the second again in the UK.

UK Open University

Students of the *Open University* are usually part-time and can take six years or more to complete their degrees. This means that, when the OU adds a new technology, many students can compare it with the existing ones. They tend to adopt the new one, only if it gives them clear advantages over the old. In that light, the majority tend to adopt rapidly devices that facilitate straightforward transactions, such as looking up one's records or booking residential facilities for courses or seats for graduation ceremonies. They certainly enjoy communicating with each other – 200,000 messages a day fly around the OU system – and they also enjoy the computer conferences, where the students and tutors on a course can engage in discussion. To be noted is that effective computer conferencing, much like an effective meeting, depends on a good moderator. A further facility that they appreciate and use intensively is access to sets of documents selected and up-dated for each course – they need neither to travel to libraries nor to use the electronic search-engines of the web. Its popularity is signalled by the leap from 60,000 uses in 1999 to 176,000 in 2000.

However, all the activities above have little directly to do with actually studying the course. On this point, although the OU has had great success with some CD-ROM and web-enhanced courses, most students prefer to *read books as books* and not as downloaded computer files. Possibly, for

sophisticated study and thinking, the old technology of the book is more effective; but there may also be an element of a time lag in fully utilizing a new technology.

Making 'online' materials more effective then requires identifying and playing to the strengths of the medium. This would entail capitalizing on (i) the potential for interactivity, (ii) the communicative nature of online technology and its capacity to support asynchronous discussions, (iii) the capacity to generate models and options of many kinds through manipulating variables, and (iv) the capacity to enhance productivity through master classes either one-way for many thousands of participants or interactively for smaller groups with tutors and home-based learners. In sum, *Information and Communication Technologies* (ICT) offer two key virtues: *support for active learning* and *wide access to a range of media*. However, devising good active learning experiences is expensive and therefore requires designs that really do create productive learning for students.

While 'online learning' is indeed a great advance, it nevertheless does not remove the value of all other approaches to teaching and learning and the other entire valuable media and technologies. The challenge is to get the right mix of 'offline' and 'online' activities, tailored by level of education, subject, student audience and so on.

"How might these insights from formerly disadvantaged adults be turned to the advantage of excluded adolescents?" Two very different projects offer pointers.

The Hole in the Wall

The first, from India, has become known as the *Hole in the Wall* Project. Sugata Mitra of the *National Institute for Information Technology* (NIIT) had observed his five-year-old son playing with a computer and concluded

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that children could learn to use the computer with minimal help from adults. To test his hypothesis, he built a computer with a touch-screen into a wall in a Delhi slum, where most children did not go to school. He observed that children aged 8 to 13 years mastered the basic skills and facilities within a month. Now 30 computers have been similarly installed in settlements south of Delhi. The children who use them beg for keyboards, but Mitra and his colleagues do not yet know how to build one that will survive out in the open.

Mitra draws two conclusions. *First*, *Minimally Invasive Education* does exist: children can learn everything on their own. *Second*, it may be possible to train the hundreds of millions of young people needed to make the *'digital divide'* a thing of the past. These conclusions underline the four strengths of 'online' learning identified above.

Learndirect

The second 'online 'project aims to benefit the unemployed and those hampered by a poor education and to increase the skills base of the UK's population. The project, called *learndirect*, is still young, but already operates on a large scale: within 18 months it has enrolled 100,000 people for 218,000 learning units, some of which are as short as 20 minutes in length. An independent evaluation has compared *learndirect* with 32 other online providers around the world. It finds that *learndirect* is unique in some respects and distinctive in others. The project's uniqueness lies in:

- its origin in public policy at a national strategic level;
- it's offering e-learning opportunities to non-traditional learners;
- its large scale of operations and broad national customer base – it has more than 1,000 learning centres distributed throughout the country.

Its distinctive features are that:

- it has social as well as economic objectives;

- it uses providers who are mainly publicly-funded and whose learners are also publicly-funded;
- it mixes brokerage with direct provision, rather than providing the full service on its own;
- it is explicit about how its products relate to national qualifications frameworks;
- its products are basic and intermediate skills in bite-sized chunks that can be aggregated and disaggregated according to the learners needs;
- it uses interactive learning transactions rather than simply providing online resources, and is independent of any timetable;
- it has developed comprehensive online learner support facilities and offers impartial advice, as well as access to other providers' courses.

The three projects signal that any question about whether 'online learning' is evolution or revolution has the answer that *it is both*. The *Open University* (OU) experience is that evolution and the integration of new technologies with older media is the approach that suits mature university students best. *Learndirect* indicates that, if excluded populations are to be the clientele, there is no substitute for public policy and the involvement of public institutions. On the other hand, the *Hole in the Wall* shows that ICT can revolutionize children's learning by making it much more autonomous. This last finding must be good news for the campaign to bring *Education to All.*

General Discussion

Although open learning does seem an attractive option for expanding secondary education, the high unit costs in Mexico, despite a relatively large scale, and the unsatisfactory situation in Zambia do combine to question as to *"whether it really does offer a solution for very poor countries"*. On the other hand, cost comparisons are methodologically difficult, particularly with programmes that involve high start-up costs, but have relatively low operating costs, so that unit costs decline substantially, as the scale of the programme increases. For example, doubling

Mexico's enrolments, as is planned, will not double the unit costs, but on the contrary, reduce them.

Also, part of the cost is accounted for by dropout and failure rates. Hence, good management, quality and efficiency are indeed important factors in constraining costs, as the experiences of Ethiopia and Mauritius exemplify. A further consideration is that arranging access for, and reaching, the *'excluded'* will always be more expensive than reaching the 'included'. Of course part of the cost may be amenable to recovery from the more advantaged, as in Zambia, where rural open learners pay a third less in fees than their urban fellows.

Additionally, relative cost structures need to be taken into account, as those in Asia and Latin America are lower than those in Africa. Lower relative salaries and other costs allow Indonesia, Argentina and Mexico to provide tuition and texts free, and, where populations are very dispersed, to organize even very small classes at the end of the working day. For example, in Argentina, one school of three lower secondary grades had a total of just seven students. In Africa, by contrast, higher relative salaries and costs constrain the options available to resource-poor countries like Zambia and Malawi.

The perspective of policy also comes into play, as the contrasting cases of Tanzania and Kenya illustrate. Tanzania kept control of secondary education in the hands of the state and has a low secondary enrolment rate. Kenya, on the other hand, encouraged the *Harambee* movement for communities to establish their own secondary schools and consequently has a much higher rate.

In sum, despite less than fully conclusive data, open learning does appear to offer an additional way of reaching *'disadvantaged'* or *'excluded'* adolescents with opportunities for education that will formally equip them for employment – or self-employment – in the modern sector and information society, as well

as for the wider challenges of their roles in families, local communities and larger society.

The aggressive marketing of ICT has aroused exaggerated expectations about their potential, on the one hand, and provoked strong scepticism on the other, so that with the *digital divide*, there is also an *attitude divide*. This perhaps helps to explain the relatively slow take up of ICT in education. Clearly, a measured discussion is needed of the potentials and limitations of the new technologies. That said, there should be a firm understanding that the discourse should be more in the nature of creating solutions than of identifying problems. It should be understood also that the mere existence of ICT is no substitute for public policy on their utilization and development, especially as regards the interests of the disadvantaged. The effects of the ICT are, after all, not predetermined: an OECD report on ICT showed that Finland and Ireland owed much of their economic growth to them. As their impact can be shaped and guided, governments and educators should strive to be proactive in capitalizing on the potential that the ICT have opened. At the same time, they need to be alive to the risk that the attractions of ICT and feelings of urgency about narrowing the digital divide might divert resources from EFA and perversely exacerbate the inequities that already exist *between* and *within* societies.

In so far as education and autonomous learning are concerned, there must be no belief that the technologies in themselves generate active learning: that will depend much more on methodology and design. *Autonomous Learning* and *Minimally Invasive Learning* are key guiding concepts. However, while the observations from the *Hole in the Wall* are indeed exciting and thought provoking, it must be borne in mind that the learning achieved by the children was not structured for particular purposes or longer term goals, in the manner of school curricula and courses for qualifications. Nor did the issue of efficiency arise. Learning autonomously, the children mastered how to download and play games from the Internet within a month. *"If they had*

had structured tuition, might they have mastered the same matter within a week?"

This question introduces the issue of the teacher, alias the facilitator or instructor. While there may be some risk that some governments may try to rely on ICT rather than recruit and train more teachers, it is more likely that facilitators will continue to be needed, if only to help the learners make the most of the online interactive instruction (as in the case of *learndirect*). Therefore, training in the use of online courses might well start with in-service training for the teachers, as with the 'Imfundo' project, a joint initiative between the South African Government and the ICT industry. Experience in Thailand has shown that teachers are good autonomous learners, willing to help each other and to produce their own materials, while there has been success in the Sudan in using satellites to train teachers. From teachers, training could extend to tertiary institutions, then senior secondary schools and gradually through to the primary schools. Science teachers may find ICT more efficient and effective in teaching science than depending on ill equipped and poorly supplied laboratories. The concept of ICT helping to accelerate the drive for EFA at the primary level, if not necessarily in primary schools, seems feasible in principle, provided the teachers enjoy the right kind of training and the universities supply the right kind of help in structuring the content and interactive exercises. Also, the possibility of using online assessment systems to enable people to cross from non-formal educational programmes to more formal and more widely recognized courses seems feasible.

Although access, not attitudes, is the main drag on the dissemination of ICT and, however effective the ICT in promoting learning and education, there should be no underestimating the constraints. The availability of the necessary infrastructure, the capital costs and limitations of the hardware and telephone connections, the investments and capacity needed to create the learning programmes, and the recurrent costs of running and maintaining computer systems and paying telephone charges, all need to be reckoned

with. In many countries, the infrastructure for electricity and telecommunications is still inadequate and unreliable, while alternatives like solar power and wireless technology have not yet reached the point of being widely usable. Although projects like the World Bank's *WorldLinks* have succeeded in linking schools in nearly 50 countries with each other and to the *Internet*, there have been problems, as in the Gambia, where senior secondary schools found their hard disks failing because of climatic conditions. Although some telecommunications companies offer free telephone time and access to the Internet, as a form of investing in the future, most still do not. Websites can be very useful, but are costly to maintain. Although CD-ROM technology is a promising way forward, the capacity for designing high quality products is still limited, while the costs of producing the disks locally remain high, globally uncompetitive and therefore risky.

This last observation touches the issue of scale and thus the issue of minority languages. The bias of ICT and CD-ROM in large-scale production and wide, indeed global, communication will favour dominant languages with large numbers of speakers and writers. Minority populations will need to make yet more special, probably expensive, provisions to protect their languages, and may find their disadvantage deepening.

The overall thrust of the discussion was that an optimistically prudent mode of exploration and experimentation should continue, quick to capitalize on emerging positive potentials and vigilant for possible negative repercussions. As for the *digital divide*, in all new media the beginners have an advantage, which is gradually diluted as others take up and develop the instrument. The cinema provides an analogue: Hollywood began films, but now Bollywood makes many more. This observation does not intend to foster complacency or to undermine the very necessary deliberate drive and action to narrow the divide. It suggests only that *bridging the divide* is not necessarily a hopeless undertaking.

Theme 3
Modalities of development co-operation

At its meeting in Florence in June 2000, the IWGE discussed *Sector-Wide Approaches* (SWAp) to development co-operation and the functioning of the *Heavily Indebted Poor Countries Initiative* (HIPC) within them and suggested that these themes be raised again at its next meeting. Particularly helpful would be studies of how the approach was actually working with governments in the field. The current meeting pursued the theme of SWAp with reports from the perspectives of the European Union and the World Bank, and from the findings of a Sida-financed study of implementation in two countries, Mozambique and Zambia. On HIPC, the meeting discussed some of the experiences of AFD and the World Bank.

Sub-theme 3.1: Sector-wide approaches

SWAp and the EU

Johan Stierna,
European Union (EU)

The EU is very concerned to see European countries move together to a sector approach, keeping in mind the centrality of poverty reduction. In SWAp, two issues seem of particular concern. The *first* is whether the approach is acceptable to recipient governments, as well as to donors. The *second* is the fact that all involved are still in a learning mode, since there are still difficulties with definitions and appropriate designs. The EU's own position is a clear willingness to work for and with SWAp, as is shown in the recent Cotonou agreement with the ACP countries, and hopefully in co-ordination with all other donors.

The main sectors in which the EU is moving forward include transport, agriculture, health and education, with 16 co-operating countries interested in working on the education sector and utilizing direct budgetary support.

The EU Working Group on SWAp is still in the process of developing its thoughts and advice. However, some of its provisional conclusions are that the project approach is not sustainable, if local ownership and local capacity to sustain projects are lacking. The overall effectiveness of the approach has been far from perfect and it suffers from a lack of flexibility. Nevertheless, the project approach is sufficiently useful not to warrant total abandonment, even with the introduction and eventual prevalence of SWAp and budgetary support.

The group is currently considering the dilemmas of balance, political dialogue and conditionalities, and different forms of financing, for it is necessary to distinguish between financial models and the sector approach as such. If the primary aim of development co-operation is poverty reduction, then positive discrimination in favour of the most vulnerable groups needs to be a core element of SWAp, but may well require extensive policy dialogue with co-operating governments. In any case, all the stakeholders have to recognise that their capacities, to design and deal with SWAp need building. On the matter of the outcomes of efforts in SWAp, the *Working Group* understands that their derivation is not automatic and is considering how to achieve the coherence needed in sets of indicators for particular sectors.

SWAp and the World Bank

Adriaan Verspoor,
World Bank (IBRD)

The point made in the preceding discussion about the distinction between SWAp and financial instruments bears repeating. For SWAp is a process of working together for a common goal, whereas financial instruments are simply means for transferring resources. On working together,

the World Bank's experience over the past two years suggests that donor collaboration does need tightening: practice has so far been rather looser than was the original aspiration. Also, quite apart from the normal process of dialogue and negotiation between all the parties involved, some back-up mechanisms are needed to deal with unforeseen contingencies, such as has occurred in Ethiopia.

On financing instruments, the financiers do need to create some forms of joint financing, if indeed one element of SWAp is intent to reduce complexities and their resulting burdens on co-operating governments. The action of the Government of India, which now rations donors to just two visits per year for *monitoring and negotiation*, and those during a period selected by the government itself, is a symptom of the stress that donors' requirements impose on routine operations. Joint financing through SWAp may offer a way of facilitating governments' work and productivity.

One aspect of *"putting the country – rather than only the government – in the driver's seat"* is the issue of dealing with NGOs. The World Bank's experience suggests that it is better to leave governments and NGOs to deal with each other, although it is indeed necessary to encourage, even urge, governments to include NGOs in the dialogue on *"what would most likely conduce to the development of a sector and to the reduction of poverty"*.

Monitoring the operation of SWAp and reporting on progress continue to be weak, even though those in authority appreciate that these elements are essential for soundly-based policy dialogue.

The most satisfactory experience so far has been with Uganda and its *Education Sector Adjustment Credit* (ESAC). The design of that credit made no hard and fast link between the money and specified expenditure items, but supported the duly negotiated budget as a whole. The SWAp then followed the ESAC, with close links to the HIPC and PRSP processes. While

the main emphasis was on fashioning sound policy, it aimed also to improve financial management, achieve greater transparency in accounting and to promote stronger accountability.

In Uganda's case, budgetary support proved effective in promoting educational improvement. SWAp in short is a promising strategy for achieving both better collaboration between governments and donors, and more effective measures for development. However, it does require strict attention to four aspects.

First, the Government's convinced adoption and ownership of the process is vital. (This does not of course preclude bilaterals or multilaterals from withdrawing, if they feel that the government is irredeemably wrongheaded.) *Second*, it is essential to focus on key issues and not to distract the process with worries over minor matters. *Third*, effective communications, decentralization and community involvement are necessary to achieve real improvements in the classrooms of remote rural schools. *Fourth,* policy development has to be continuous – which of course requires *good monitoring and reporting*.

These four aspects entail an essential component, which the preceding discussion also emphasized. That is capacity building at all points, from donors and government ministries in capital cities right through to school management committees in the far rural areas. The four aspects also entail careful examination of government procedures for procurement and financial accounting, and prompt the search for creative approaches to donor collaboration and especially to joint financing.

A side, but an important, signal from the experience in Uganda is that efforts to bring about a *'big bang'* to attain UPE are likely to be more disruptive than helpful.

SWAp in Agency HQ, Agency Country Offices and Two Partner Countries

Abby Riddell,
Swedish International
Development Agency (Sida)

The following discussion derives from a study of current understandings and practices in SWAp among 14 Agencies of international development co-operation and two partner governments, Mozambique and Zambia[12]. It presents its observations in three sections: (i) views among the donor agencies, (ii) actual situations in Mozambique and Zambia and, finally, (iii) issues for discussion.

Donor agencies

In principle, all the donor agencies accept the concept of SWAp. None criticized the approach harshly in relation to helping build sustainable capacity in partner countries' ministries of education. Yet commitment to the concept varies, with some donors deeply committed and others sitting more 'on the fence'. In terms of appreciating that SWAp requires capacity building and institutional development within the donor agencies themselves and not simply in partner countries, there are again variations among the donors. For SWAp to work, it is necessary for the donor community to get itself into line with what the approach is expected to accomplish generally as well as for a given sector.

Currently, however, there is no standard definition of a SWAp. Several Agencies have statements of what they mean by SWAp: while they do share three basic common features, they are not identical. They assume, first, government leadership and a partnership with donor agencies, second, a single

12. Riddell, Abby, 2001, "*Sector-wide approaches in education: implications for donor agencies and issues arising from case studies of Zambia and Mozambique*", paper prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November, 2001.

policy framework and, third, the implication that a SWAp implies discussions of policies for a single development sector, with checks on links to the *Poverty Reduction Support Programme* (PRSP). On the other hand, they differ on the assumption of a single expenditure framework and on the use of a partner government's procedures to implement financing and plans in place of an agency's own, so as to reduce the complexity of the burden on a government's machinery, and facilitate work on the ground. In Mozambique, there was discussion of creating process indicators for monitoring the donor community and its co-ordination. But without greater clarity and agreement on what is or is not supportive of a SWAp, such measures will fail. Grappling with differences in perspective has not really been part of the donor communities' agendas either in Mozambique or Zambia, or, very likely, in other countries as well.

Beyond definitions, interviews, within several bilateral and multilateral agencies about policies, guidelines, organizational development, competencies, professional development, information needs, inter-agency collaboration, levels of authority and co-ordination with multi-sectoral development plans, reveal a continuing state of flux regarding SWAp and their implementation. Operationally, this is sometimes reflected in ambiguity and lack of clarity about the division of roles and responsibilities between local country offices and headquarters. This suggests that the donor agencies are possibly paying insufficient attention to their own institutional development and capacity building, even as they worry about institutional development and capacity building in partner countries. As a previous presentation noted, where SWAps are concerned, donor agencies themselves are in a learning mode, but may not appreciate the fact sufficiently.

Also inter-agency collaboration is not without its problems. Although donors and governments are expected to be working towards *common approaches*, differing operational styles slow progress towards that goal. Some bilaterals are strongly centralized, with country offices enjoying relatively

limited discretion. Others are strongly decentralized, with considerable decision-making powers vested in their embassies or country offices. Co-ordination between donors has to be built locally and supported centrally: differences in roles between local and central offices can generate different approaches by different donors within one partner country, which can prove contentious, even though the differences may not be frankly confronted.

For instance, some donors can contribute to basket or pooled funding, while others cannot. The former are said to view themselves as *'like-minded'*, to consult among themselves and to exclude the latter from the discussions. The latter of course find such practice offensive and argue that the thinking behind it confuses SWAp as an approach with particular financing modalities. Comments like these reveal not only hurt feelings, but also different conceptions of what sector-wide approaches entail.

Information sharing is the least to be expected of a supportive donor community, yet there are signs within the two partner countries studied that it is practized only imperfectly. One symptom of this is the sheer number of independent donor missions inflicted on the Ministry of Education in Mozambique – 23 in the first six months of 2001. If donors were pooling information effectively, *"would the Ministry have had to expend so much of its resources of time, capacity and talent on facilitating so many fact-finding missions?"*

How well a SWAp progresses will be affected by the way in which different strands of the donor community go about their business. The creation of the EU *Code of Conduct* shows that the donor community acknowledges this. Yet a recent report states *"the EU Code of Conduct appears to be poorly disseminated and widely ignored"*[13]. Further, donors do not think

13. ActionAid Alliance, 2001, *"Increasing the effectiveness of donor co-ordination: a case study of the education sector in Bolivia, Burkina Faso and Tanzania"*, London, ActionAid Alliance.

alike on the issue of the appropriate roles each should take toward other donors in SWAp environments. Some back away from the idea of donors' mutual responsibility, on the ground that it is the partner government's business, since the SWAp is meant to be the government's sectoral agenda. Others talk about joint responsibility *"to be willing and able to mobilize the less involved", "to question, to find ways to be more effective, to propose processes and solutions to overcome our constraints..."* Evidently, although most monitoring has so far focused on partner governments, there needs to be rather more monitoring of the activities and performance of the donor community itself.

Financing mechanisms can also pose difficulties. For instance, in Zambia, three bilaterals have pooled their funds for the *Basic Education Sub-Sector Investment Plan*, so that the Ministry of Education has only one bank account to manage. Unfortunately, however, the IDA Credit for the same plan has to be placed in a separate bank account. Rather than simplify the work of the Government of Zambia, this arrangement complicates it. Similarly, as noted above, some donors have no problem with pooling funds with others in the interests of a partner country, but others need for political reasons to be able to identify their contributions with particular outcomes and achievements. Resolving issues like this may well require changes for some agencies to the regulations and laws governing their *practices in lending and donating*.

Partner countries

The two partner countries studied, Mozambique and Zambia, illustrate that there are still many visible rough spots in the achievement and reinforcement of the institutional and behavioural changes necessary for a successful *Sector-Wide Approach* (SWAp). These rough spots affect three main areas: restructuring ministries, effecting decentralization, and establishing sound financial management competencies. In addition, the current slow pace of implementing the SWAp has two unfortunate effects. On the one hand, it

limits and reduces the *'buy-in'* of those donors, who need results on the ground to sustain political support for international development co-operation. On the other, it disappoints and disillusions those donors, who are keen to contribute increasing sums of money to education, which is now acknowledged to be a significant means to reduce poverty and is a major component of most donors' development policies.

The Mozambique *Education Sector Strategic Plan* has its origins in the country's *National Education Policy, 1995*. It was pre-appraised in 1997 and in 1998 jointly appraised by the Ministry of Education and international donor agencies, who found it to be an appropriate framework for sector-wide support. Its three main goals for the period 1999-2003 centre on access, quality and an institutional and financial framework that will sustain the country's schools and students into the future. The total cost was estimated at US$717.2m, of which $444.6 would come from the Government and $272.6 from international sources. As a first part of the latter, an IDA Credit for $71m was successfully negotiated.

Three years after the joint appraisal, in 2001, donors remark that very little has been achieved, as there has been no real push on the ground, while only $2m of the IDA Credit has been utilized. A large part of the explanation lies in the need for a *'cultural'* change, a move away from the established hierarchical decision making, in which the 'boss' is seen as the problem-solver and an abnegation of responsibility *making decisions and taking responsibility* for decisions once made. This culture hinders efforts to decentralise in two ways: (i) it inhibits subordinate levels from initiatives and decisions; and (ii) it also allows superordinate levels to overlook contributions from below. The examples in Mozambique are the neglect by the centre to feed provincial education plans into the national plan. Furthermore, although data collection is good, few use it for policy analysis, so that only a few with power have the ability to make sound judgements to steer policy.

One of the intents of SWAp is to promote the prioritization of expenditures to replace the submission of *'wish lists'*. Activity-based budgeting was the agreed instrument for the purpose. However, the intent to institutionalize it has been held up by the difficulty of restructuring existing financial management systems to a form that permits the identification of activities and equally by the need to build the ministry's capacity to manage activity-based budgeting.

In Zambia, the first modification to the concept of SWAp sprang from the fact that responsibility for education is divided between four ministries. Co-ordinating the four bodies plus the array of donors was deemed altogether too challenging, so that, in 1998, the *Basic Education Sub-Sector Investment Programme* emerged. The Programme derives from the 1996 Education Policy Paper, *'Educating our Future'* and was jointly appraised to cover the four-year period, 1999-2002 and to promote reforms in eight specific areas, including programme management and decentralisation with capacity building. The total cost was estimated at $590m, of which $307m would come from the government and $283 from international sources.

Part of the investment programme needed some restructuring in the *Ministry of Basic Education*, measures to expand decentralization and a reform of the financial management system to achieve stronger adequacy and more transparency.

By late 2001, only the last component had been addressed rapidly and effectively. Restructuring had not taken place and had in turn exacerbated the difficulties of institutionalizing reformed government procedures. It had also slowed the process of decentralization, which has meant that planning and budgeting have remained exclusive to the central ministry, rather than shared with the provinces and districts. Furthermore, developing the appropriate range of mechanisms for engendering wider stakeholder involvement in the programme has been slow and difficult.

Nevertheless, on the positive side, the management bodies do meet and function, activity-based annual budgeting is now routine and expenditure, though lower than originally planned, has been increasing, from 15 per cent of original budget in 1999 to 50 per cent in 2000. Even so, the slow pace of change works against the desire of donors to disburse, so that some do so, despite benchmarks not having been reached.

Issues for discussion

The task for donors and country stakeholders alike in implementing a SWAp is to:

- agree a vision;
- work through various modalities toward integration;
- keep the donors away from the driver's seat, but still in the car;
- restructure and define jobs and competencies for them as necessary;
- design and implement continuous capacity building linked to performance assessment and pay;
- use government mechanisms and strengthen them;
- remain flexible to enable late-comers to join whilst still maintaining the vision.

The problem is that these tasks have to be carried out in politically volatile environments, both in the country, as well as in a ministry of education itself. Donors themselves are not completely co-ordinated and make demands on ministry personnel for data, reports, visits and larger missions. Add to this the reticence of donors about criticizing the ministry or each other, and problems, rather than being resolved, often go from one annual review to the next.

The issues involved in accomplishing these tasks in such environments are several. For the donors, the two major ones seems to be, *first*, a

responsibility to develop their own institutions and build their own capacities, so that they can arrive at a clear consensus of what a SWAp entails on their part, even as they strive to facilitate the efforts of partner governments to be more efficient and more effective through reducing the transaction costs of aid. The consensus needs to include some consideration, on the one hand, of the responsibilities that donors have to each other in promoting consistent approaches to SWAp, and on the other, the discretion each has to initiate new approaches with partner governments, and to move ahead of other donors without necessarily waiting for them to make up their minds.

The *second* major issue for donors is monitoring their policies and behaviour against guidelines like the EU *Code of Conduct.*

For partner governments and ministries, on the other hand, there appear to be four major issues. *First* is ensuring that the ethos and expertise required to make SWAp successful are not confined to a few individuals. On the contrary, they need to be so widely shared within ministries, that the will and capacity to sustain the reforms grow independently of particular officials or groups of officials.

Linked to this is the *second* issue, ensuring that aspirations for decentralization are actually effected throughout the system and that the reforms are not limited to the headquarters in the capital city alone.

Third is the issue of ensuring a growing fit between medium-term expenditure frameworks and the sectoral resource priorities.

Fourth is the matter of working to reform general government procedures for management and finance, so as to facilitate SWAp without having to set up parallel systems.

General Discussion

Six years have already passed since the move towards SWAp began. By now there should be *sufficient experience and information available* to enable a systematic and substantial discussion about the effectiveness of the approach and the most productive ways of fitting both donors and partner governments to undertake it. While it is true that all the stakeholders are still in a learning mode, learning does need to be supported by updated and shared knowledge. There is some risk that simply focusing on and discussing SWAp as a process begins to mistake the instrument for the purpose. It is notable for instance that the discussion so far has confined itself to the modalities of *management and finance,* with no attention to the effects on the quality of education in classrooms or the quality of the learning outcomes. Nor has there been any indication that *'sector-wide'* is comprehensive enough to include consideration of children with disabilities. There is no doubt that continuous learning is needed and that, in the cases of institutions as large as ministries of education and agencies of development co-operation, the process is necessarily gradual and slow. Indeed, there might be some benefit in extending studies of how individuals and organizations are helped to change their behaviour to examine how governments might be brought to change theirs. Nevertheless, SWAp should by now have more to show for the entire intellectual, negotiating and implementing effort that has been invested in it.

SWAp cannot be separated from issues of governance and the slowness in effecting decentralization is as much due to hesitation arising from weak capacities to monitor implementation and expenditure – and local leakages of resources[14] – as to weak capacity just to implement new financial management procedures. Many ministries of education, especially in Africa, still think more in terms of EFA than in terms of the education sector as a whole. Moving

14. 'Leakages of resources' occur more at local levels and less at central levels, where they tend to be larger. Experience in Uganda shows that local leakages are easier to handle, and are better treated as an issue of incentives and management than moralistically. India's practice of visible local budgets seems effective in this regard.

them to widen their perspective will require a more thoroughgoing effort to share SWAp experience with them. Within aid agencies, such sharing seems satisfactory. But within partner countries, the aid agencies do not share well with each other, much less with the government and its ministries – and in some cases, the country offices do not seem to be in tune with their own headquarters. The situation within ministries of education tends to be even worse.

To make SWAp truly *sector-wide*, *sector-wide participatory approaches* are needed: for instance, there should be series of seminars with the teachers' unions. At present, the teachers within systems are not even aware that SWAp is afoot, let alone have any idea of what the approaches entail, how they are designed, how they are prepared, or how they will affect the teachers' own daily practice. Stimulating local planning and linking it with national planning is difficult enough, but such an attempt would be in vain without *'sector-wide awareness and discussion'*.

Quite as vital as the need for *sector-wide information and knowledge* is the need for *sector-wide capacity building*. Decentralization cannot work, if the people who are expected to make it work do not know what they are expected to do, how to do it and within what parameters they can operate. Incentives are certainly needed to induce central governments to decentralize more thoroughly and to create more extensive partnerships with NGOs and other elements of civic society. Even though dealing with civil society is mainly the responsibility of the partner government, the donor community could and should treat the issue more seriously and ambitiously, building perhaps on the EU's example in the *Cotonou Agreement*. In this, the organizations of civil society are treated as substantive stakeholders, equally entitled to support for capacity building. This recognizes that the capacity to exercise the decentralized powers effectively and responsibly has to be on the ground, also, and as noted earlier, possessed even by school management committees in poor, remote rural communities.

It should be borne in mind, too, that one element of the capacities that need to be built – especially in support of fostering effective decentralization – is capacity in monitoring and evaluation, although there are likely to be constraining attitudes, which view monitoring and, even more, evaluation more as inspection than as gathering information for improvement. One of the more effective devices for both capacity building and monitoring and evaluation is to give priority to engaging local rather than international consultants for the short-term tasks entailed by SWAp. The simple existence of such a policy stimulates the formation of local capacity, which international training can reinforce and expand.

In regard to monitoring the performance of donor communities in promoting and supporting SWAp, a device adopted in India is worth a note: donors all follow a single set of procedures, but work on projects in different districts. However, they do not monitor *'their own'* projects by themselves; instead, joint missions enable them to guide, encourage and learn from each other.

Connected with this is observance of the EU *Code of Conduct*. Although the code is still in process of refinement and although it has not yet been sufficiently thoroughly disseminated, it is nonetheless being implemented – examples can be seen in Mali and Mauritania – and its observance is spreading. While the concern here is the education sector, the code could be adapted for other sectors, taking account of their peculiarities and formulating specially tailored guidelines.

Cross monitoring and a common code of conduct could well serve to promote co-ordination within the donor community. Joint progress reports are already possible, joint procedures could be possible in the near future. Some donors already join in basket or pooled funding, others channel resources through what are called *'sleeping partnerships'* – the Dutch for example are

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channelling some funds through DfID in Malawi[15] – while yet others contribute to special trust funds.

The issue of joint funding is important, as without it, donor co-ordination could be undermined, if not brought to collapse. The range of institutional hindrances in terms of regulations and laws needs to be addressed: while the bilateral donor agencies have to work only with their own governments, the World Bank's Executive Directors have to consult – or be instructed by – more than 180 governments, before they move to change the IDA's or IBRD's rules on lending and accounting. The hint to the bilateral agencies is clear: they could help move their governments to move the World Bank's *Executive Board* in the desired direction.

The thrust for donor co-ordination, harmonizing procedures, mechanisms for joint funding, *'sleeping partnerships'* and the like provoke a radical question: *"what is the comparative advantage of operating with a variety of agencies rather than, say, with a single agency to act for the interests of all like-minded agencies in a partner country?"* Although the question was too radical to be pursued, its pertinence was well taken.

One of the intents of SWAp is to provide budgetary – rather than project – support for development with the aim of rendering unnecessary the mechanisms that have often been set up in parallel to the partner government's own for financing and managing particular development projects. Yet the difficulty and slow progress in reforming the general disbursement and accounting procedures of many governments has led to parallel mechanisms for the SWAps themselves. In effect, results on the ground are bought at the cost of slowing institutional development. Ironically, on the other hand, if a ministry wishes to avoid the complexities and delays of the procedures for

15. This arrangement contrasts with DfID's decision – regarded as a pity by other *'like-minded'* donors – to pull out of *the Common Fund Pool* in Mozambique in favour of macro-level budgetary support.

procurement required by IDA Credits, it could do so by having the credit channelled through the government's budget. Ironing out these anomalies clearly takes time.

Currently, SWAp in education tends to involve only the ministry or ministries of education. However, they do offer an opportunity for fostering a cross-ministry approach in support and for the enrichment of one development sector. While the history of attempts at inter-ministry co-ordination underline the practical difficulties of implementing such a concept, not implementing it does of course risk missing the inter-linkages between sectors. A possibly more practicable extension of that approach would enlarge the network of donor co-ordination on SWAp in education to include more specialized agencies of the United Nations – at present, the specialist agencies in health, food and employment do not contribute to the development of sector-wide perspectives on topics that are of central interest to all school and university-going young people.

One of the factors, said to be militating against basket or pooled funding and against budgetary rather than project support, is the need for some donors to be able to point to specific developments as justification for their governments' development co-operation programme with a given partner country. This argues strongly for the education of public opinion in donor countries, so as to form a climate, such as exists in the *'like-minded'* group, under which the reasons for anonymously funding sector or even macro-economic development are understood and acceptable.

At the conclusion of the discussion, four major issues seemed to stand out:

- how best to take donor co-ordination forward;
- the need for capacity building in all stakeholders at all levels, along with the need to design and implement a close dialogue with all the stakeholders;

- the need not to lose sight of the fact that SWAp is not a goal in itself, but only the latest instrument fashioned to attain more effective development and poverty reduction, and, in the context of the meeting, better education for all;
- maintaining the links between SWAp, EFA and PRSP requires more thorough discussion.

Sub-theme 3.2: *Heavily Indebted Poor Countries* (HIPC) Initiative

HIPC and France[16]

J.C. Balmes,
Aga Khan Foundation (AFD)

The main aim of the Government of France in its *Heavily Indebted Poor Countries* (HIPC) Initiative is to *dissolve*, over a 15-year period, virtually all-bilateral debt owed to France by highly indebted poor countries. For countries participating in the franc zone the removal will be 100 per cent. It will be somewhat less for countries outside the franc zone. In monetary terms for the nine most heavily indebted countries in the table, the debt will be reduced from its current level of 3,542 million Euros to 71.3 million Euros by 2015, a reduction of 98 per cent.

A subsidiary aim of the initiative is the reduction of regional disparities. The instruments will be two or three sectoral development programmes in each country, underpinned by a rapid disbursement process in direct support for government budgets. France will negotiate with each country a *'debt-dissolving contract'*, which will specify the purposes for which the resources released can be applied. The central principle is that these resources are complements to a country's normal budget, not replacements for it. France will also offer help in formulating sectoral strategies to reduce poverty.

16. Balmes, J.C. 2001. "*Situation et échéances des prêts souverains de l'AFD*", table of data and projections of debt for nine countries in Africa.

While the central approach will work through strengthening the institutions for planning, budgeting and management, it is well recognized that, in a number of instances, budgetary processes are unstable, so that there will be some uncertainty about the actual transfer of resources to schools and other educational institutions themselves.

HIPC and the World Bank[17]

Adriaan Verspoor,
World Bank (IBRD)

This discussion reviews the application of the *Heavily Indebted Poor Countries* (HIPC) Initiative to education in 18 countries in Africa since 1996. The original objective of HIPC in 1996 was simply to reduce the debt burden of very poor countries to a sustainable level. Three years later, in 1999, the objectives were broadened to produce faster and deeper debt relief and to strengthen the links between debt relief and poverty reduction. The HIPC process entailed three steps: (i) a preliminary assessment of the magnitude of debt that a given country could sustain; (ii) a decision point on the nature and extent of relief that would be offered to a country; and, (iii) a floating completion point, so called to allow flexibility in programming and implementing the range of policies and measures to qualify for debt relief. At the end of 2000, four of the 18 countries had reached the decision point, while nine were in the preliminary stages of assessment.

Reducing the debt burden should allow governments what is called *'fiscal space'*: the funds released from debt service commitments should enable governments to apply more income from revenue to development and poverty reduction. If all goes according to plan, for instance, debt service obligations for the 18 countries should be reduced from nearly 30 per cent of revenue in 2000 to about 10 per cent in 2005, releasing some 20 per cent of

17. Verspoor, Adriaan. 2001. *Status of HIPC processing*, slide set prepared for the IWGE meeting, Lisbon, Portugal, 19-21 November 2001.

revenues for development purposes. In cash terms, the reduction would be from some US$4 billion to US$2 billion, thus creating a fiscal space of some US$2 billion.

The top priority development purposes are *education* and *health*: the first is to benefit from 39 per cent of debt relief, the latter from 29 per cent, totalling between them 68 per cent of the amount available. The remaining 32 per cent is to be distributed among *HIV/AIDS*, *rural development* and *water supplies*, *governance and institutional development*, and *road construction*.

For education, the additional funds should mean an increase of some $300-400 million per year. The effective use of those resources is clearly necessary, so a number of conditionalities have been laid down to stimulate policy reform. These cover three main areas: *improving education finance* through increasing and reallocating public spending, reducing school fees and providing scholarships for target populations; *addressing teacher issues* in recruitment and deployment, devising incentives for rural postings, improving the intake/graduation ratios of training colleges; *enhancing student coverage and flows* through developing better indicators of coverage and improving survival rates.

In addition to these areas, each country will have its own special programmes: for example, Tanzania will complete school mapping in half its local authorities, Burkina Faso will prepare a detailed decentralization action plan, Malawi will improve the handling of textbook distribution, Rwanda will establish a framework for community participation in school government, and so on.

These measures under HIPC are clearly intended to bring about short-term structural changes in the context of broader reforms for poverty reduction. They make more sense, when seen as part of SWAp and PRSP. Indeed, preparation of a PRSP is required as part of the documentation reviewed at the HIPC *decision point* and one year's satisfactory implementation of the

PRSP is a condition for reaching the HIPC *completion point*. An example may be taken from Uganda. The 2000 PRSP for that country includes components for a virtual SWAp for education. In addition to universal primary education with improvements in teacher/pupil ratios, availability of textbooks and overall quality, there are components for secondary, tertiary and adult education also.

For the secondary level, the aim is to raise the transition rate from primary school to secondary schooling and vocational training to 65 per cent by 2003. The monitoring indicators include net and gross enrolment ratios, a set of quality indicators and the incidence of benefits, including access for the poorest 20 per cent of the population. For vocational secondary education, the aim is to increase the size of the enrolment to 100,000 students by 2003, and to monitor progress not simply through enrolments and graduations, but also through the actual employment of graduates.

For tertiary education, Uganda aims to expand enrolment from 25,000 to 50,000 undergraduates by 2003, to ensure that women make up 40 per cent of enrolments, to eliminate disparities by district and increase access for the lower income groups, and to provide places for 8,000 government supported students at Makerere University. Progress will be monitored through total enrolments and distribution by gender, socio-economic group and district of origin.

For adult education, the aim is to achieve an 85 per cent adult literacy rate through a 5-year adult education programme and to monitor progress through literacy rates distributed by gender and district.

In each of these five areas of the education sector, progress has been made, although of course difficulties and challenges in implementation remain. One example will illustrate the situation. Public spending on education doubled between 1995-2000, but the allocation for Makerere University rose by only

7 per cent. Even so, enrolments at Makerere rose from 9,369 in 1995/1996 to 20, 368 in 1999/2000, while the share of privately sponsored students exceeded 70 per cent in that year. Put a little differently, Uganda achieved excellent progress in expanding university education without overburdening the state budget. On the other hand, there are worries about the access available to the poorer social groups and about the quality of learning under such rapid expansion.

Overall, it is clear that a SWAp provides a better basis for structuring resources released through HIPC within a PRSP.

General Discussion

The approach of linking dialogue concerning the *Heavily Indebted Poor Countries* (HIPC) Initiative with *Poverty Reduction Strategy Credits* (PRSP) and with *Sector-Wide Approaches* (SWAp) in education seems very promising. In addition, linkages to *Education For All* (EFA) are really important, while those who promote EFA need to work within these frameworks and ensure that EFA is fully integrated in SWAp. Furthermore, of course, ministers of finance have to be deeply involved, so that the negotiated numbers do appear in real budgets and are actually disbursed for the intended purposes.

There could be some concern that, as the *Poverty Reduction Support Programme* (PRSP) takes a long view, current expertise in poverty reduction might well involve a long *waiting period before poverty is actually reduced.* For education, this could have a 'knock-on' effect of further delaying the enrolment of poor children in school, since for many poor families enrolment requires the *prior reduction of poverty.* Similarly, the three steps of HIPC themselves appear to require some considerable time. There could be concern that this would delay extending access to education for rural and poor populations, especially for women, so that measures to accelerate the process might be considered.

The first concern above could be readily addressed by using part of the resources released by HIPC to create targeted scholarships, and other supports, to remove financial obstacles to enrolment. There should be no problem about supporting demand and expanding enrolments. What may prove trickier is expanding the supply of schools and delegating teachers to meet the demand. Even there, a major constraint on rapid expansion is the inability to pay for the salaries of the additional teachers. The HIPC 'bonus' would reduce that inability. As regards the rural areas, the aim to expand enrolments in itself necessitates extending access to rural and other under-served populations, simply because most urban areas are already adequately served.

What both concerns indicate, yet again, is that plans for EFA do indeed have to be better integrated with PRSP and that ministries of finance and education have to be made more accountable for *ensuring the linkage* and *implementation.*

In this regard, the intent to have appropriate sets of indicators to monitor progress is welcome. Indeed, indicators are urgently needed to justify future planning and financing. However, the practical issues of how such indicators are to be first formulated and later observed in actual practice have to be satisfied. Formulating them does indeed need to be very rapid. Perhaps more important is having the process of formulating them put into motion and putting it into motion at the very outset does help get the rest of the process of planning under way. For instance, in Tanzania, school mapping for half the municipalities must conclude with a plan for the construction of schools.

Observing quantities is, of course, not enough, even though *quantitative indicators* do imply some *qualitative change*. Quantitative indicators *do not* capture changes in the classroom, improvements in the quality of learning and the effectiveness of learning. Indicators for such aspects of education need teachers to be involved, trained, fully aware and enthused about their value and use. Much more work needs to be done on developing indicators of both kinds, which all stakeholders in education can *handle, understand* and *value.*

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Among the stakeholders are the various organizations comprised in civil society. It is important that they are involved in PRSP, as well as in SWAp for education, since participatory processes can help ensure the success of both. In current efforts at SWAp, however, the lack of representation from civil society is very marked. As a key player in HIPC, the World Bank could be very influential in engendering wider participation in both PRSP and SWAp.

Participation by civil society could help answer local questions about *Education For All* (EFA) and *Education For What?* (EFW). *"Is it education for self-employment or education to meet the requirements of evolving labour markets of wage and salary employment?"* While sound primary education is recognized to be a general preparation for employment of any nature, civil society can help ensure its relevance for wider roles in society, civics and culture.

Two questions arose about allocating 39 per cent of the resources released by HIPC to education. First, what proportion of the total resources needed to achieve EFA does that 39 per cent constitute – i.e. how much of the gap would it cover? No answer to this question was possible at present, for three reasons. As the magnitude of debt differed between countries, 39 per cent of the HIPC *'bonus'* would clearly constitute various proportions of differing education budgets. Also, so far no calculation had been made of the full cost of attaining EFA for the individual HIPC countries. From the perspective of the highly indebted countries as a group, no reliable figure was available on the likely total cost of their achieving EFA, so that calculating how much of the gap the *'bonus'* would cover would be difficult. A further consideration in refraining from an estimate is the range of possibilities of greater efficiency in the use of resources: that could reduce the cost to rather less than currently feared.

The second question had to do with earmarking the 39 per cent for education: *"would it be firm, or would it depend on the response and capacity*

of the education authorities of a particular country?" The answer was that the figure of 39 per cent was only an estimate for education: the exact percentage will depend on working and negotiating with countries to use the opportunity at hand.

As for the longer-term future, most of the HIPC countries do not have the resources of their own to continue developing their own systems to keep pace either with their populations or with the changes incessantly required in a globalized world economy. Will they continue to receive support for education, even after they have reached the completion point of their HIPC plans? This issue has not yet been fully thought through. However, where governments fail to take the steps they have agreed, they could well face reductions in support through the HIPC initiative.

In this connection, it was noted that the Heads of both the *International Monetary Fund* (IMF) and the World Bank had expressed disappointment that no new funds from the OECD's *Development Assistance Committee* (DAC) had so far been pledged to ensure that the Dakar undertakings would be fulfilled. This meant that the foreseen financial needs have not yet been securely met. On the other hand, no country has so far been unable to fund its plans, when it had those plans complete and ready. Also, *all the donors have so far lived up* to their Dakar promises. Present fulfilment coupled with uncertainty about the future implies that there has to be a continued and continuous struggle for more targeted money for education.

In the light of the earlier discussion on monitoring the performance of donors in SWAp, the question was raised as to whether the "*donors were obliged to meet any conditions that matched or corresponded with those imposed on the partner countries in HIPC?"* As the question was not explicitly answered, the inference is that there are no such conditions for donors.

Theme 4
Information sessions

Sub-theme 4.1: Human Immuno-Deficiency Virus/Acquired Immunity Deficiency Syndrome (HIV/AIDS)

An Educational Strategy to Prevent HIV/AIDS[18]

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International Institute for
Educational Planning (IIEP)

A brief sketch of the present situation with HIV/AIDS will serve as a background to introduce UNESCO's strategy to help combat the pandemic. In 1981, five cases of a new disease were reported: they were the first signs of HIV/AIDS. At the time, nobody suspected that there were many thousands of people already infected. By 2001, twenty years later, some 22 million people had died from the disease, 60 million more had been infected, up to 15,000 more were being infected daily, while some 14 million children had been made AIDS orphans. Neither the disease itself, nor its rate of spread, were evenly distributed: sub-Saharan Africa had some 25 million infected people and during 2001 had close to 4 million new infections, while Asia and the Pacific, with a much larger total population, had some 6.4 million infected people, with fewer than a million new infections during 2001.

The AIDS epidemic *impacts economies* in two ways. *First* is the loss of production and productivity through the loss of educated and skilled workers, *second* is the burden of caring for the sick and tending the orphans. In the case of Africa, the disease has infected such large proportions of teachers,

18. UNESCO. 2001. *"UNESCO's strategy for HIV/AIDS preventive education".*

health workers and other trained professionals, that it has proved a development disaster.

All major UN agencies have initiated efforts to combat the spread of the pandemic. UNESCO launched its own as far back as 1986, when the *Division for Life Sciences* developed a Programme entitled *'Man against Virus'* to stimulate health-related biological research. Since 1996, UNAIDS has had the co-ordinating role for the UN's efforts and has taken the lead in setting a common agenda, as well as in recommending a division of labour to implement it. UNESCO's role is not to produce primary medical knowledge, but, through intensified preventive education, to engage in advocacy, share information about the pandemic, build capacity to reduce risk, improve care and lessen the institutional impact. In evolving its strategy to fulfil the role, UNESCO bears in mind two sets of facts about the disease: one set *covers the nature of HIV/AIDS* and the other covers the *profile of ignorance* about the disease.

As regards the nature of HIV/AIDS, the salient facts are that there is, as yet, no cure for it, no vaccination is yet in sight and the treatments currently available are so costly as to put them out of the reach of most of the victims. In countries where the *per capita* annual income is only one or two dollars per day, very few can afford the $15,000 annual cost per patient of some treatments.

As regards the *'profile of ignorance'*, most of those infected by the disease are not aware of their infection; a major percentage do not even know what the disease implies and nor do most of those immediately expose. In many communities there are mistaken beliefs about the causes of the disease and actions to avoid it misguided, even *counterproductive* for the infected and *destructive* for others; misconceptions engender *prejudice, discrimination and exclusion.*

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These two sets of facts make it clear that, at present, the only feasible counteraction to HIV/AIDS is prevention, while the experiences of the industrialized countries show that low infection rates are above all due to *successful preventive education*. However, education here does not mean simply the provision of information: it means shaping education to bring about changes in beliefs and mores. Preventive education aims to change behaviour by providing knowledge, fostering attitudes and conferring skills through culturally sensitive and effective communication.

UNESCO's five core tasks in promoting effective preventive education are:

- advocacy at all levels;
- customizing the message;
- changing risk behaviour;
- caring for the infected and affected;
- coping with the institutional impact of HIV/AIDS.

Different settings require a different balance and focus between these five elements. If *done right*, preventive education will work. If *done immediately*, it will have long-term impacts. If *done massively*, it can turn the tide of widening infection. To help get such education right, UNESCO will bring four of its sectors in to support the main thrust of its Education Sector. The *Natural Science Sector* will advise on the latest messages to deliver and on the broader science literacy within which they have to be placed. The *Sector of Social and Human Sciences* (SHS) will advise on the social contexts within which actions are to be taken and the ethical considerations that need to enter. The *Sector for Culture* (CLT) will advise on the cultural complexities that must be taken into account in the implementation of policies. The *Sector of Communication, Information and Informatics* (CII) will provide guidance and support in developing effective advocacy, clear awareness and helpful instruction.

The term 'education' is often taken to involve only schools and other institutions of instruction and learning. Although no institution reaches out wider than the school, it is nevertheless a fact that many children are out of school, and more and more drop out as age increases. Schools then do not reach all, and they reach fewer in the age groups most at risk from HIV/AIDS. Neither do schools penetrate other highly exposed groups such as migrant workers, soldiers and sex workers. Therefore, alongside promoting school-based programmes, UNESCO will help devise non-formal modes of education, using all media, to spread socially targeted messages and skills about communicative diseases. For the same reason, UNESCO will work at mobilizing all social institutions to promote preventive education – government departments at all levels, trades unions, businesses, religious institutions, *Non-Governmental Organizations* (NGOs) and *Community Based Organizations* (CBOs).

Alongside prevention, UNESCO will emphasize the universal human right to *"... medical care and the right to security in the event of sickness or disability ..."*, and promote the *knowledge*, *attitudes* and *skills* to provide care for the infected and the affected. Successful long-term care for the infected requires full co-operation and open communication, conscientiousness and compassion on all sides – not just between patients and health personnel, but also among family and friends, colleagues and community.

This rights-based approach extends also to those affected by HIV/AIDS. The stigma and poverty brought about by the disease are creating new social cases of children excluded from education, and adults with reduced livelihood opportunities. A rights-based response to mitigate these impacts of HIV/AIDS and monitoring the impact on EFA goals are therefore essential. Legislation and administrative action are required to ensure the right of affected people to education and to combat discrimination within the education sector.

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Coping with the ramifying impacts of the pandemic will require timely and accurate information on the nature and magnitude of those impacts. UNESCO will therefore develop and disseminate tools for monitoring and assessing the impact of the pandemic on students, schools, teachers, educational and related institutions through *UNESCO Institute of Statistics* (UIS) and the IIEP. It will also pursue other steps necessary to ensure that all this information is well analysed and appropriately disseminated and applied, to cope with, and mitigate, the adverse repercussions of the disease.

Education and HIV/AIDS – a window of hope[19]

Ruth Kagia,
World Bank (IBRD)

A perspective that is not often taken in discussions of the HIV/AIDS pandemic is the 'personal' one. Five years ago, one knew nobody who had contracted or died from HIV/AIDS. Now every telephone call home finds some relative or friend taken ill with this disease, and each succeeding call names someone closer and closer to the core family. At one time in Malawi, the cabinet ministers numbered 23. Three years later, nine of them had died from HIV/AIDS. UNESCO's concern about the impact on institutions and governance is by no means misplaced. However, the materials that are published on the dimensions, spread and effects of the disease seem to miss this essential human element.

The incidence of HIV/AIDS is now some 50 per cent higher than WHO had predicted in the 1991. The two factors that seem to explain this surge are *misunderstanding* and *denial*. Too many people do not understand the nature and destructiveness of the disease and too many refuse to acknowledge its *causes*, even, sometimes, its *existence*. So far, official responses to the situation have been in the nature of fire fighting – *ad hoc*, opportunistic. Now we see

19. Kagia, Ruth. 2001. *Education and the HIV/AIDS global epidemic: a window of hope*, paper prepared for the IWGE, Lisbon, Portugal, 19-21 November 2001.

the beginnings of systematic anti-AIDS strategies and plans. *"What should be the role of education in them?"*

For a powerful pointer, it is worth recalling that, in the early years of the AIDS epidemic, the most educated people seemed to be the most vulnerable. Now they are the most responsive to information and advice. In Uganda, to take one instance, after participating in a 2-year school health programme, the percentage of students who reported being sexually active dropped from 43 to 11 per cent. By contrast, a control group, exposed only to the standard national curriculum, showed no significant decline over the same period. Clearly, as the last paper declared, education is the most potent means available for slowing and possibly halting the spread of the pandemic.

The facts, statistics and issues that concern the interaction of education systems and the HIV/AIDS pandemic have all been clearly and comprehensively set out by the previous paper. This discussion will limit itself to pointing briefly to some of the promising approaches that countries have fashioned to counter the spread of the disease.

School-based prevention campaigns: Zambia's school-based prevention programmes began almost 10 years ago in 1992. They address teachers and schoolchildren, particularly targeting youth and in addition reaching out to community schools in an effort to influence the informal sector. Among the positive results has been a nearly 50 per cent drop in the percentage of HIV-positive pregnant girls (15-19 years) in the last six years.

Skills-based health education: India's pioneering *'Better Life Options'* programme recognizes that, on its own, information about sex and HIV is insufficient to bring about behavioural change. It takes a holistic approach toward adolescent girls, integrating education, livelihoods and reproductive health, and including interpersonal skills, critical and creative thinking, decision-making, self-awareness, and the development of attitudes and values needed to make sound health-related decisions. Studies showed significant programme impact on participants'

economic empowerment (completion of secondary education, vocational skills), autonomous decision-making (when to marry), reproductive health (knowledge of HIV/AIDS), and self-esteem and confidence.

Peer-education and focus on youth: South Africa, Tanzania, Uganda and Zimbabwe have launched 'youth-to-youth' school health programmes, which focus on secondary and rural schools. They use young people – including some already out of school – as volunteer educators, recognizing their creative energy, ability to be role models and the simple fact that they are available. Training the volunteers is crucial: they need to have basic health education, know how to extend school life into community activities, and how to help especially vulnerable children gain the knowledge and confidence to take advantage of the programme's youth-friendly services.

Support for orphans and out-of-school youth: In the Philippines, an *Out-of-School Children and Youth Development Project* aims to serve the burgeoning numbers of AIDS orphans and other out-of-school youth (who pose an increasingly severe challenge to the countries worst affected by AIDS). The project uses a tripartite partnership (government, civil society and business) to target low-income families, to offer formal basic education and technical education, as well as a free community-based delivery system with self-paced learning. It couples two principles: recognizing the importance of enabling youth to participate on the basis of equality and recognising the importance of the family connection.

Multimedia campaigns: Thailand used effective multimedia campaigns to reach large numbers of people, when HIV/AIDS was ravaging the country. South Africa's *'Soul City'* Programme is succeeding in advancing knowledge of AIDS, changing attitudes and modifying social norms towards safer sexual behaviours. It presents themes on sexuality through a number of vehicles: a prime time television series, a radio drama, booklets and a range of other materials.

Strategic planning: Assessing the impact of the pandemic on the education system in such terms of the attrition of teachers or the non-enrolment and dropout of AIDS affected children is clearly necessary for projecting the future needs of the sector, if only to ensure stability and quality of supply. Four countries have used a World Bank partnership model, *'Ed-Sida'*, to project HIV/AIDS impact on supply and demand in education.

Partnership: The success of the approaches described above depends heavily on strong collaboration and partnership across sectors, across stakeholders within a country and across international agencies. The *Health and Family Life Education Initiative* in the Caribbean offers a good example of how diverse partners can come together to mount a strategic and scaled up response. The partnership includes the *Caribbean Community* (CARICOM) ministers of education and health, the University of the West Indies, the Pan America Organization, the World Health Organization and a large number of UN agencies. Under a single, unified plan of action, the programme promotes empowerment and behavioural change.

Finally, it might be helpful to sketch how the World Bank has been involving itself in the battle against AIDS. It has already:

- with 26 countries in Africa *introduced* the *Focusing Resources on Effective School Health* (FRESH) programme. The effort includes skills-based education for HIV/AIDS prevention; school health policies on HIV/AIDS discrimination; fostering a healthy school environment; and school-based counselling and health clubs for HIV/AIDS;
- *supported* programmes such as *'Heart and Soul'*, a Kenyan soap opera that will from early 2002 offer *'edutainment'* on themes such as sexual promiscuity and human rights to audiences across the country;
- *launched* the *'Hope for African Children'* initiative, which aims to build awareness about and ensure the health and education of the world's 13 million AIDS orphans;

- *supported* a pilot Philippine project that has helped provide learning opportunities to 6-24 year olds, prepare high school dropouts for employment, build institutional capacity to address such needs, and notably involved businesses in the effort;
- *earmarked* initial amounts of US$500 million on concessional terms for Africa and $155 million for Caribbean countries to support anti-AIDS projects developed by the countries themselves.

In the immediate future, the World Bank will aim to:

- *Strengthen* its advocacy to reinforce political commitment for integrating anti-AIDS efforts into an accelerated EFA programme.
- *Support* macroeconomic reforms – combined with social protection- to ensure the national context needed to achieve the international development goals.
- *Help* low-income countries include pro-EFA and anti-AIDS efforts in the Poverty Reduction Support Programme (PRSP).
- *Support* countries in building their knowledge base about AIDS and education.
- *Provide* loans to encourage countries to pursue the promising approaches described above.
- *Strengthen* global-level work with partners, to maximize collaboration (including financial) in the pursuit of health and education for children and youth in developing countries.

General Discussion

There seems to be an insufficient grasp of the fact that, in some countries, HIV/AIDS is causing a *devastating revolution* among rural communities. Literally, a whole generation of adults is *disabled by* and *dying from* AIDS. This means that food production declines, there is less food available, children – especially girls – are kept at home to care for sick adults, they miss school, and when they are able to attend, they are less healthy and less able to learn. There are

many orphans now who are heads of families and have to try to grow the family's food. But there are no adults to teach them the traditional skills and many of them lack the physical strength to do all the necessary agricultural work. In effect, there is a need to change the mode of production, but the expertise to do it is simply not available. The schools could help, but schools still persist in neglecting what might be termed skills for life. Ideally, schools should go to the children – Namibia offers an example of what is possible – and should form wider alliances with communities to see that the knowledge and skills that will enable them to survive are available and taught. Also, although PRSPs have begun to take account of the pandemic, they could certainly give more attention than they do at present to such ramifications as have been described. In their current stage, however, the PRSPs have not mainstreamed counter-AIDS measures and do not stipulate precise actions to be taken.

To confront such formidable challenges with effective preventive, and in one sense remedial education, the concept adopted by the UN and UNESCO of inter-sectoral and inter-disciplinary partnership is vital. Relying solely on the 'cognitive paradigm' of simply peddling knowledge would be ineffectual. Combining the medical knowledge of the health organizations with the cultural, psychological and behavioural knowledge of the social sciences appears convincingly to be the way forward. Thailand's rejection of a global, generalized approach in favour of closely focused, customized strategies, built from analyses of behaviours, down to the sexual mores of specific ethnic groups, clearly paid off. The flat and declining rates of infection in a number of countries signal the potential effectiveness of well founded, fully thought through, and adequately implemented, *preventive education programmes.*

For Africa, ADEA has been exploring the possibilities of similar programmes in Senegal, utilizing aspects of the country's local cultures. The approach needs to be adapted for educational programmes for schools also. Here the question of how to include parents – and in a number of cases, even

the grandparents – in the programme will have to be squarely addressed. Implementing such programmes in sub-Saharan Africa will likely prove more problematic than in Thailand, since the countries of the continent have fewer teachers, the teaching profession itself has been reduced and disrupted by AIDS and the institutional structures and capacities to design, plan and support such programmes are much weaker. Also, even when programmes such as those run by IIEP do form the capacities, the beneficiaries only too often move away to possibly greener pastures. That said, if the teachers can be properly prepared to undertake the programmes, the schools can certainly be mobilized for them. An additional challenge will be preparing teachers and children to be ***carriers*** of the message to their wider communities.

Mentioning the teachers recalls that their profession is suffering severe attrition precisely because of the pandemic. The education system is in effect part of the problem and has difficulty dealing with it. For example, in Tanzania, the recent population projections made no calculation of the likely effect of AIDS on teacher attrition[20]. Nor was any thought given to the possibility of recalling retired teachers to help make up the deepening deficit. Nevertheless, a number of education systems will have no choice but to consider emergency measures to ensure a sufficient supply of teachers. For instance, pre-service training might be shortened in favour of relying more on in-service courses to keep teachers' knowledge and skills refreshed, and up-to-date. Experience with *Oral Rehydration Therapy* (ORT) that so effectively reduced infant mortality rates, demonstrated that intensive short courses, using inter-sectoral approaches, and coupling instruction with drama and personal contact, made sound educational strategy.

20. On this point, there was a suggestion that, given the reticence and evasiveness associated with the disease and discussions about it, it might serve to measure deaths only. Some care was needed, as attrition among the teachers did not seem as yet to be affecting pupil/teacher ratios.

The school and the teaching profession should, of course, not be considered the only vehicles of preventive education, even for children and adolescents. The potential for CBOs and NGOs to act as partners in building the connections between what is learned in schools, and what is learned and adopted in their communities, needs to be recognised and developed. At the same time, given the diversity of beliefs and values in any country or even community, there could be problems in co-ordinating a large number of varied organisations. Also, however effective CBOs and NGOs might be, it bears recalling that the main source of information for adolescents – and possibly the main influence on their behaviour – is other adolescents. In some circumstances, indeed, school could become a dangerous place – for example, boarding schools with wrong-headed but influential adolescents could put other students at risk. Saying this implies once again that a plurality of modes, as well as the involvement of the mass media, is needed for effective education.

One of the issues that preventive education programmes should emphasize is that of the disparity between young males and young females. It might be said that the virus thrives on gender, for female adolescents are twice as likely as males to be infected. A related issue that must be brought into the open is that of mother-to-child infection.

A longer-term aspect of prevention is the propensity of the HIV to mutate. Education programmes for infected persons and preventive education programmes for the carers of infected persons need to stress the vital importance of complete compliance with the regime for a given drug, so as to reduce opportunities for such mutations to occur.

On the question of monitoring, measuring and assessment, an office seminar in Nigeria produced such stunning revelations about the prevalence of the disease and its threat to development, that it prompted the notion of an analogue to the now standard environmental assessment in development planning: *"should there be an HIV/AIDS assessment to help gauge the viability and sustainability of a programme, as well as the needs for preventive*

education efforts addressed to the various population groups involved?" That would be a pre-assessment. Equally necessary would be measures to assess the actual learning and later application of what was learned. This would be particularly important for adolescents in school programmes, despite the difficulties of measuring detailed impacts, because of the delicacy of the questions to be put.

A final point in this discussion was a reminder from the IIEP, as UNESCO's *'Lead Institute in planning education to deal with the HIV/AIDS pandemic'*, that it had established a site on the *World Wide Web* which contained all the studies so far available on AIDS and education.

Sub-theme 4.2: Dakar 'Education For All' Forum Follow-up

John Daniel,
United Nations Educational, Scientific, and Cultural Organization (UNESCO)

Between the Jomtien Conference in 1990 and the Dakar Forum in 2000, progress towards *Education For All* (EFA) was disappointing. Therefore, UNESCO and the *High Level Group* are now meeting regularly to monitor progress toward the millennium goals for EFA. At its meeting in October 2001, despite the lack of hard statistics, the High Level Group was able to take an optimistic view on the basis of the reports available. The Group offered five recommendations:

- Countries *should accelerate* their education sector plans. Liaison and technical support should be available for them, civil society should be associated with the plans and there should be regular review meetings, such as those held by the *Ministers of Education in Africa* (MINEDAF).
- Countries *should develop* criteria and mechanisms for reviewing the resources available to them and the further resources that need to be mobilized. This would mean ensuring the coherence of the flagship programmes, strengthening the national resolve to create the necessary budget for education and maintaining liaison with the G8.

- Every country *should operationalize* the Dakar 'Framework for Action' by March 2002, and *agree* and *implement* the global initiative. This will require distributing the strategy statement to the various task forces and clarifying what is involved in the global initiative, which is essentially resource mobilisation, through (i) increased external funding for basic education, (ii) greater predictability in the flows of external funding, (iii) using debt relief for basic education, (iv) stronger co-ordination between donors and (v) strengthening SWAp.
- UNESCO *should prepare* the next monitoring report and should make it *'harder hitting'* in pinpointing weaknesses and lags. An Editorial Board will agree on the contents and organize the process. The *UNESCO Institute for Statistics* (UIS) is prepared to co-ordinate the process, but needs other partners to 'shoulder' portions of the task.
- The High Level Group itself should ensure that its discussions are focused on operational matters and work on the ground. It will need to agree a format and venue for its next meeting. (The meeting in October 2001 was held as part of the *UNESCO General Conference*. That made it too large and too crowded and somewhat diluted its discussions.)

A total of *six flagship programmes*, which entail mainly advocacy, were agreed in October: (1) Girls' education, in which UNICEF will take the lead; (2) School health; (3) HIV/AIDS, in which UNAIDS will take the lead; (4) Literacy; (5) Education in situations of emergency, and (6) Early Childhood Care and Development. It is likely that *four more programmes* will be added in due course: (i) Teachers and quality; (ii) Education and disability; (iii) Information and Communication Technologies in EFA and (iv) Governance and education.

Besides the flagship programmes, there is ongoing work on quality in education, the state-of-the-art in information and communication technologies, life-skills and vocational education and education for living together.

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General Discussion

The discussion revealed a 'degree of unhappiness and discontent' with the thinking, progress and measures reported. First of all, the *High Level Group* appeared to have repeated a number of familiar, established phrases and perhaps to have reached a *state of stasis* in its thinking. It did diagnosis and goal setting well, but seemed less certain about the process of *attaining the goals*. It was not clear how the Dakar resolutions were to be translated into the terms and actions of individual countries. It was mentioned, in that regard, that the *High Level Group* did recognize that countries are very diverse in the actions they feel capable of taking. Therefore a 'schedule of implementation', for reporting purposes on how they were proceeding and progress made, was to be sent to stakeholder groups in all countries.

These completed schedules are due to be returned by March 2002, after which the *High Level Group* will have a Consolidated Report compiled and analysed. In developing the data for the report, UIS faces a tension between 'country ownership' and 'objectivity'. However, independence is vital for the report, if only to avoid 'gutting' its credibility. The related issue of identifying just how each country's process is undertaken and put in hand will be more difficult.

There was, too, a contention that the flagships seem to be 'landlocked': if they consist mainly of advocacy, rather than planning and action on the ground, it is hard to envisage their having much effect. While the usefulness of advocacy was acknowledged as a means to move governments to focus more persistently on the themes in question, the flagships should not remain at the level of advocacy only, but be embedded in work at the country level. Also, while advocacy should avoid pressing too many points at once, the flagship themes were of such importance, that each country's SWAp should address them explicitly: how, for example, to integrate the concerns about HIV/AIDS into the work that is already under way. Alongside these concerns there was also the task of getting governments and other stakeholders in

their countries to take 'ownership' of the flagship themes. This is another way of expressing the tensions between client populations and donor populations, and between head offices and field offices.

Another point of concern was the declared expectation that some 32 countries will not be able to achieve EFA by 2015. Yet the *High Level Group* appears not to have discussed how they might be supported in at least getting closer to the goals than current expectations. There is talk of reforming policies, but no actual steps seem to be taken. There really is no time to wait in determining how these countries might be helped to guarantee access to education, how to tackle their problems of supplying sufficient numbers of well-trained teachers, of achieving sufficient quality in instruction and learning, of failure rates. Large investments are needed, which do not seem to have featured in the discussions of the *High Level Group*. The major problem with these 32 countries is that in the most difficult cases, the government machines themselves are extremely weak. With *'Children in situations of conflict'*, for instance, governments often have no power beyond the capital city. Multilateral organizations are not well placed to operate in such circumstances. There are some possibilities of working through civil society, but even this option is often problematic.

It seemed remarkable, too, that, although most people in the developing countries live in rural areas and depend on agriculture, neither the Dakar Forum nor any of the flagship initiatives make any mention of *'Education for Food for All'* or of *'Education for Rural Development to Feed All'*. Equally remarkable at a recent meeting on rural development at the *World Bank* (IBRD), reference was scarcely made to education. These are vital topics that should be mutually supportive. Surely they should feature in any discussion concerning *Education For All* and *Education for What*? Might it be possible to use some technical assistance funds to develop an additional flagship on the issue? Counterbalancing this suggestion is the consideration that many governments – and teachers – find that their curricula for basic

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education are already overloaded. Attempting to foist yet another topic and set of issues onto the agenda might well be counterproductive and distract energy from issues that are already agreed to be of central importance.

Two other remarkable omissions are that no mention was made of neither educational reforms nor community involvement in the governance of schools. *"Why are matters of reform not higher on the agenda both in countries and within agencies?"* The explanation seems to be that, although reform does indeed deserve more priority, the Members of the *High Level Group* are *too courteous* and *polite* to each other and all too easily express their solidarity. *Perhaps the way to advocate reform onto the agenda would be by a better identification of reforms that have already proved successful.*

As for community involvement, which is in itself a major reform, all experiments so far show that it is indeed successful in ensuring that the hitherto excluded are brought in. Yet the *High Level Group* seems not to be much concerned with this *'last wagon of the train'*. Communities really must become *involved* and should *feature* in the Dakar initiatives, at least in efforts to help laggards catch up with progress elsewhere.

Further, the first six flagship themes do not explicitly include quality in education, although the proposed seventh does. The issue of quality in instruction and learning demands stronger emphasis than seems to be implied here. As several country experiences show, it is possible to achieve nominal UPE, but still yield outcomes of poor quality and publish misleading statistics about the state of educational achievement in the country. Quality is a priority there is no question of that, but what is needed, in addition, is that the discourse on quality should *grow tighter and more specific*.

The Dakar documents pay lip service to *Information and Communication Technologies* (ICT) in mentioning them and suggesting that they might form part of the *flagship initiatives* in due course. They seem

either to be unaware of, or to ignore the fact, that access to education is a dimension that the ICT *can* already affect. *"Do any of the country plans so far proposed include ICT as an instrument to help achieve EFA?"* There is, in fact, a tension here between the energy and enthusiasm of the promoters on the outside, and lip service by governments on the inside. Maintaining a balance between oversold, excessive expectations, on the one hand, and needlessly slow adoption of ICT for education, needs careful management.

The terms in which the flagship programmes are couched seem to suggest that the main problems lie with management. Yet the fact is that many of the variables that affect education are simply not known: why for instance do the excluded not achieve their insertion into schools or the main economy; or how are research findings incorporated into policies and measures for progress in EFA? It is possible that current approaches are too technical, for organizational change is in effect cultural change. This is hard to bring about and is always likely to meet resistance. Research is needed for all sectors and should be undertaken by local people who know a country and its cultures well. Helpful research in all aspects of education is lacking, largely because local capacity for doing the research is insufficient. Particularly in Africa, African researchers need to be engaged in examining these problems and analysing the realities of local situations so as to find or develop local solutions.

A final point on EFA is that the hill will get steeper as we climb up it. As the numbers of out-of-school children shrink, those who remain 'excluded' are likely to be *beset by a multiple of disadvantages and therefore all the more difficult to reach and accommodate.* The implications are that countries should start now on **measures to identify** those who are likely to remain out of school, and their whereabouts, to assess the resources that will be needed and the education modalities that will have to be devised. Donors should start thinking about the implications for themselves – particularly perhaps in connection with children in situations of conflict? The education community should now develop the research capacity and research to provide

the information for planning the removal of the last and probably most difficult barriers to EFA.

Sub-theme 4.3: The Group of Eight (G8) Task Force on Education

John Morris,
Canadian International
Development Agency (CIDA)

At its meeting in Genoa, Italy, in 2001, the *Group of Eight* (G8) decided to set up a *Special Task Force on Education* to assess what more could be done in support of EFA and a new Africa Initiative. The task force has to report to the next G8 meeting in late June 2002 in Kananaskis, Alberta, Canada. However, the events of September 11, 2001, have put issues of security, terrorism and economic stimulus for the world's economy at the top of the agenda for the meeting, so that time to discuss the education report will likely be curtailed.

The report is to be short and results oriented. It is to submit recommendations to support the EFA goals and processes, but must eschew any duplication of current efforts and the creation of any new entities or initiatives. It should focus on enhancing existing capacities, but any notion of a global fund for the purpose is unacceptable. In effect, the G8 knows what it does *not want*, but is less clear on what it *does want*.

The membership of the Task Force includes two heads of education departments in development co-operation agencies, in Canada and the UK. The other members are all heads of their countries' development co-operation Agencies. While they may not be education specialists as such, their education teams of course advise them.

The first meeting of the *Task Force* took place in Paris in October 2001, under Italian chairmanship. The second meeting was due in Rome at the end of November. Canada will assume the chair on 1 January, 2002, after

which there will be three more meetings: 14-15 January at the University of Peace in Costa Rica; 18-19 February 18-19 in Egypt and 14-15 April in Ottawa, Canada. The last meeting will finalise the report and submit it to the G8 Secretariat for processing. The report will thus be ready by mid-April, but it will not be made public or posted on the *World Wide Web*, until it is cleared by the G8.

Between these meetings, the Task Force will be consulting with NGOs. UNESCO has been asked to organise a forum for this – with developing countries, and with donor countries that do not participate in the G8. In addition, there will be unofficial bilateral meetings with the *World Bank* (IBRD), regional development banks and other appropriate agencies. The World Bank's country papers, which also identify gaps in policies and resources, will be helpful. There will also be a forum on the Internet, in which wider publics can participate.

The conceptual framework adopted by the Task Force for its report is one of identifying, analysing and bridging three gaps: *policy gaps*, *resource gaps* and *capacity gaps*. *Policy gaps* are perceived to do with gender, HIV/AIDS, conflict resolution and governance. *Resource gaps* are financial, technical, material and the adequacy of the resources at the disposal of the multilateral agencies. *Capacity gaps* are self-explanatory. The report will also aim to link its recommendations with previous G8 work, for example, the *Action Plan for Africa*.

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Future meetings

Suggestions for the format of the meetings

The 18-month interval between meetings was judged to be still appropriate and two and a half days a feasible and satisfactory period for intensive discussions – most preferably Wednesday through Friday. The date of the next meeting would then be in June 2003, and as the Finnish Foreign Ministry had kindly offered to arrange for a venue, the meeting would *take place in Finland.*

As regards format, the IWGE always had the problem of striking the right balance between an agenda that is rich and crowded and one that is narrow and specialized. The present meeting seemed a little *too heavy* in terms of the number of topics covered. Although the last meeting did indeed identify the different topics to be discussed at this one, it might have been possible to allow for more *intensive exchanges*, for example through small group discussions. On the other hand, the major virtue of the IWGE meetings is that they provide an opportunity to 'lift one's eyes' from one's desk and to keep members up-to-date on a wide range of issues *which preoccupy* the education donor community. A broad agenda encourages a *broader vision, opens minds and stimulates more global sharing*. The *Planning Committee* is urged to keep this need for 'balance' in mind, when planning the next meeting.

To enable participants to prepare themselves better – and to explain themselves more effectively to their colleagues – receiving the detailed agenda in advance would be helpful. However, this should not be done to the detriment of flexibility in order to ensure that the agenda covers *current* important topics of relevance to the Group Members.

Possible topics for the next meeting

A number of topics were suggested for the *Planning Committee* to consider:

- *Concentrate* on progress in EFA, particularly in the light of the goals for 2005 and 2015, with an examination of the impact of the recession or possibly even depression that is currently threatening the economies of the world.
- *Continue* the theme of the excluded by looking particularly at education for refugees and others in emergency situations. Currently, most provision is formal and conventional, but thought is needed about non-formal modalities that will enable refugees to move beyond mere survival. Also education for living together, conflict resolution and peace should be given full attention.
- *Look more* closely at issues of quality in education and the range of qualitative indicators that have been developed and used. There may be more material to discuss than is available at present.
- *Focus* on education for rural people, capitalizing on the many studies and meetings on the subject, particularly in the light of the impact of the HIV/AIDS pandemic
- *Concentrate* on girls' education, particularly to meet the EFA goals for 2005 and 2015, to allow more flexibility for education systems and to restore social status to teachers.

In addition to the substantive education topics put forward for discussion, there was general agreement that the exchanges of views on co-operation modalities should be continued and deepened. This relates particularly to *Sector-Wide Approaches* (SWAp), *Poverty Reduction Programme* (PRSP) and capacity-building, since they all need to be monitored and analysed in depth, along with the unfolding *Highly Indebted Poor Countries* (HIPC) initiative for debt reduction and its contributions to education.

Summary record of the Planning Commitee discussions

The *Planning Committee* endorsed the proposal to hold the next meeting in Finland in June 2003 and put forward the tentative dates of 18 to 20 June.

After examining the different suggestions made during the closing plenary session, the Committee considered that priority should be given to the realization of the objective of equality of opportunities by gender. The main substantive topic then could be *"Increasing girls' participation: how to make it happen?"* This would allow the Group to review concrete experiences of countries having succeeded in increasing girls' participation and removing gender bias, in general (impact of various measures) and in practical terms at local level (how the involvement of communities, NGOs and decentralization measures can make it happen).

For the next meeting, it was considered necessary to reduce the number of substantive topics covered but to continue the discussions on SWAp, PRSP and HIPC.

The format of the next meeting should allow for more intensive discussions of actual cases that illustrate each of the topics, and for more exchanges between participants. The cases, mostly success stories of *'making it happen'*, will be selected to help attract full participation from IWGE members, while the preparations will ensure that participants receive the cases in good time to be able to study them, before they arrive for the meeting.

To promote more rapid and more thorough intermingling of the participants, so as to promote fuller participation by newcomers in the more formal discussions, a communal dinner is important and will be organized, probably for the first evening.

Appendix A
List of participants

I. MULTILATERAL AGENCIES AND INSTITUTIONS

African Development Bank (AfDB)
Mr Sibry J.M. TAPSOBA
Chief Education Specialist, OCOD 1

Association for the Development of Education in Africa (ADEA)
Mr Mamadou NDOYE
Executive Secretary

European Community (EC)
Mr Johan STIERNA
Directorate General for Development

Food and Agricultural Organization (FAO)
Ms Lavinia GASPERINI
Senior Officer, Agricultural Education Extension,
Education and Communication Service, Research, Extension and Training Division, Sustainable Development Department

International Institute for Educational Planning (IIEP)
Mr Gudmund HERNES
Director

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Ms Françoise CAILLODS
Deputy Director

Mr Gabriel CARRON
IWGE Consultant

Mr John OXENHAM
IWGE Consultant

Organization of Ibero-American States (OEI)
Ms Dolores LOPEZ-ARANGUREN

United Nations Educational, Scientific and Cultural Organization (UNESCO)
Mr John DANIEL
Assistant Director-General, Education Sector (ED)

United Nations Children's Fund (UNICEF)
Ms Mary Joy PIGOZZI
Senior Education Advisor
Education Section (ED), Programme Division

International Bank for Reconstruction and Development (World Bank) (IBRD)
Ms Ruth KAGIA
Director of Education

Mr Adriaan VERSPOOR
World Bank Consultant

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II. BILATERAL AGENCIES AND FOUNDATIONS

Aga Khan Foundation (AKF)
Ms Marilyn BLAESER
Senior Programme Officer, Education

Calouste Gulbenkian Foundation
Mr André Corsino TOLENTINO
Director for Co-operation with New African States

Austria
Alexandra STRICKNER
Austrian Foundation for Development Research
Department of Educational Co-operation

Belgium
Mr Edwin BOURGEOIS
Education strategies Unit,
Directorate General for International Co-operation (DGIS)

Canada
Mr John F. MORRIS
Principal Advisor – Education
Scientific, Technical and Advisory Services Directorate Policy Branch,
Canadian International Development Agency (CIDA)

Finland
Mr Heikki KOKKALA
Education Adviser
Department for International Development Co-operation (DIDC),
Ministry for Foreign Affairs

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Mr Hannu SAVOLAINEN
Niilo Mäki Institute

France
Mr Jean-Claude BALMES
Chef de Division Education, Agence française de Développement (AfD)

Germany
Ms Ingrid JUNG
Education, Science and Documentation Centre,
German Agency for International Development (GTZ)

Ms Gisela FROMMER
Basic Education Specialist, Division Education, Science, Youth,
German Agency for Technical Co-operation (DSE)

Ireland
Ms Liz HIGGINS
Education Adviser, Technical Support Unit, Development Co-operation Division, Department of Foreign Affairs

Japan
Ms YumikoYOKOZEKI
Science, Technology and Mathematics Programme,
Japan International Co-operation Agency (JICA), Ghana

Norway
Ms Randi LOTSBERG
Technical Department,
Norwegian Agency for Development Co-operation (NORAD)

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Portugal
Ms Maria Angelica RIBEIRO
Co-ordinator
Gabinete de Assuntos Europeus e Relaçoes Internacionais,
Ministry of Education

Sweden
Ms Ewa WERNER DAHLIN
Head of Education Division, Department for Democracy and Social Development, Swedish International Development Co-operation Agency (Sida)

Mr Hans PERSSON
Programme Officer
Department for Democracy and Social Development,
Swedish International Development Agency (Sida)

Ms Abby RIDDELL
Sida Consultant

United Kingdom
Mr Tony DAVISON
The British Council

Mr Stephen MATLIN
Chief Education Adviser, Department for International Development (DfID)

Mr Digby SWIFT
Department for International Development (DfID)

United States of America (USA)
Mr Gregory LOOS
Head, Basic Education Division,
United States Agency for International Development (USAID)

III. OTHER PARTICIPANTS

Jeremy MINDES
Co-ordinator,
International Working Group on Disabilities and Development (IWGDD)

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Appendix B
Detailed programme

Monday, 19 November		**Chairperson**
09.00-09.15	Word of welcome by G. Hernes (IIEP) Official opening by João Praia (Secretary of State of Education, Portugal)	
09.15-10.30	**Theme 1:** Recent trends in education aid policies and practices – Show and Tell (Agencies' Representatives)	S. Matlin
10.30-11.00	*Break*	
11.00-12.30	– Show and Tell (continued)	
12.30-14.00	*Lunch*	
14.00-15.15	**Theme 2:** Including the 'excluded' (a) Education for people living in rural areas – Panel composed of: L. Gasperini (FAO), D. Swift (DfID), Y. Yokozeki (JICA) – General Discussion	M. J. Pigozzi
15.15-15.45	*Break*	
15.45-16.45	(b) Education for adolescents with no access to traditional secondary school – Panel composed of : M. Pigozzi (UNICEF), F. Caillods (IIEP) – General Discussion	R. Kagia

16.45-17.45	(c) Education for persons with disabilities and special needs – Panel composed of : H. Kokkala (Finland), H. Savolainen (Finland), J. Mindes (International Working Group Disabilities and Development) – General Discussion	
18.00	Reception offered by the City Council of Lisbon at "Padrão dos Descobrimentos" in Belém	
Tuesday, 20 November		
09.00-09.45	(d) The role of new technologies for reaching the excluded – Introductory presentation by J. Daniel (UNESCO) – General Discussion	M.Blaeser
09.45-10.30	(e) Alleviating the cost of education for the poor – Introductory presentation by T. Davison (British Council) – General Discussion	
10.30- 11.00	*Break*	
11.00-13.00	**Theme 3:** Modalities of development co-operation (a) Sector-Wide Approaches (SWAp) – Panel composed of : A. Riddell (Consultant Sida), A. Verspoor (Consultant World Bank), J. Stierna (EC) – General Discussion	E. Dahlin

13.00-14.30	*Lunch*	
14.30-16.00	(b) Highly Indebted Poor Countries (HIPC) Initiative – Panel composed of J.C. Balmes (AFD), A. Verspoor (World Bank) – General Discussion	G. Hernes
16.00-16.30	*Break*	
16.30-18.00	**Theme 4:** Information sessions (a) HIV/AIDS and education – Panel composed of : R. Kagia (World Bank) G. Hernes (IIEP) – General Discussion	J. Daniel
Wednesday, 21 November		
09.00-10.30	– Follow-up of Dakar World Education Forum – Introductory statement by J. Daniel (UNESCO) – General Discussion	G. Loos
10.30-11.15	*Break*	
11.15-12.30	– Miscellaneous – Proposals for further action of the Group and Conclusions	G. Hernes
12.30	*Lunch*	

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